TATA CONSULTANCY SERVICES

Experience certainty. IT Services
Business Solutions
Outsourcing

TATA

BSNL CDR, CRM Application

Version 1.0

User Manual, June, 2009

BSNL, Hyderabad, India

TATA CONSULTANCY SERVICES

Experience certainty. IT Services
Business Solutions
Outsourcing

BSNL CDR, CRM Application

Version 1.0

User Manual, June, 2009

BSNL, Hyderabad, India

Click and enter Address of TCS Delivery Centre

Notice
This is a controlled document. Unauthorised access, copying, replication or usage for a purpose other than for which it is intended, are prohibited. All trademarks that appear in the document have been used for identification purposes only and belong to their respective companies.

PF3020

Document Release Note

Notice No.:

Customer: BSNL

Project: BSNL CDR

Document details

Name	Version no.	Description
CRM User Manual	Version 1.0	

Revision details

Action taken (add/del/change)	Previous page no.	New page no.	Revision description

Change Register serial numbers covered:

The documents or revised pages are subject to document control.

Please keep them up-to-date using the release notices from the distributor of the document.

These are confidential documents. Unauthorised access or copying is prohibited.

Approved by: Authorised by:

Date: Date:

PF2060C

Document Revision List

Customer: BSNL

Project: BSNL CDR

Document Name: CRM User Manual

Release Notice Reference (for release)

Rev. No.	Revision date	Revision description	Page no.	Previous page no.	Action taken	Addenda/ New page	Release notice reference

About this Manual

This manual provides the tasks/scenarios that can be performed using the CRM application.

Purpose

This manual has been written to help you understand the scenarios in the CRM Application. It contains the procedures that you should know for performing your business tasks.

Intended Audience

This manual is intended for the personnel in the CRM department.

Prerequisites

Following are the prerequisites for performing the tasks presented in this manual:

Functional	Basic functional knowledge of the services provided by BSNL
Technical	• Basic knowledge of Siebel application • Should have attended CDR training conducted for CSRs

Organisation of the Manual

Information in this manual has been organised as follows:

Organisation of this Manual

Chapter	Description
Business Scenarios	
Landline	Lists various Business Scenarios for Landline
WLL & PCO	Lists various Business Scenarios for WLL
PCO	Lists various Business Scenarios for PCO
Centrex Group	Lists various Business Scenarios for Centrex Group
Call Hunting Group	Lists various Business Scenarios for Call Hunting Group
ISDN	Lists various Business Scenarios for ISDN
Complaints	Lists various Business Scenarios for Complaints
Broadband	Lists various Business Scenarios for Broadband

Typographical Conventions

The following table gives the details of the typographical conventions used in the document:

Typographical Conventions

Formatting Convention	Type of Information
Title Case & **Bold**	All the buttons used in the application are written in Title Case & **Bold** font. For example, Click **Submit Order**
Italics	All the error messages, alerts, status of the fields and values are written in *Italics*. For example, A message, *Validations Successful,* appears
Field Names	All the field names in this document are written in Title Case. For example, The Account Name field is a hyperlink
User-entered text	Text that you enter appears in Arial font

References

The following documents were used as references:

i. CRM System Requirements Specifications V2.4

ii. BID DOCUMENT 2006_7.8.

Feedback and Suggestions

|Email: customercare@bsnl.co.in|

|Support Hotline: 1500|>

Contents

The total number of pages in this document, including the cover page, is 116.

1 Business scenarios – Landline

This section describes the business scenarios performed using different modules of the CRM application. A business scenario is a procedure which contains number of independent tasks that span across different modules.

The detailed steps for the individual tasks are explained in the corresponding modules. Some scenarios explain the interaction with the external applications.

This section provides:

- Prerequisites for performing the scenarios
- Different scenarios in the CRM application

1.1 Prerequisites

- Login credentials for CRM application
- Prior knowledge about the scenarios

1.2 Scenarios in CRM

Scenarios in CRM can be categorized as follows:

- Landline
- WLL
- PCO
- Centrex
- Call Hunting Group
- ISDN
- Complaints
- Broadband

This chapter deals with the Landline scenarios.

1.3 New Permanent Phone Connection

In this scenario, a new customer requests for a new phone connection. The customer details are collected in the Customer Acquisition Form (CAF) and the details are entered into the system. Depending on the customer's exchange, the Service Id(Phone Number) is provided.

A New Permanent Phone connection is created in two ways:

- Using the Auto Order feature
- Manually

To create a New Permanent Phone Connection, information in the following entities should be provided in the CRM Application in a particular order as given below.

i. Contacts
ii. Customer Accounts
iii. Billing Accounts
iv. Orders

Once the Order is created, the system automatically creates an Asset against that particular order. In other words, an Asset is created for every completed order. Creating an order is controlled by the exchange of messages between the downstream systems, that is Clarity and the Billing system. As per the requirement of the customer, Clarity system controls the switch configurations either manually or automatically and sends the feedback to CRM in the form of controlled messages.

The above mentioned entities can be created either manually or using a special feature called Auto Order. This feature is implemented to minimize the time and effort in creating an order. This feature bypasses creating the Customer Account and the Billing Account. In other words, you can create a Contact and click Auto Order to automatically create an order using the default values. The procedures to create a connection using Auto Order feature as well as manually are described in the following sections.

1.3.1 Creating a New Permanent Phone Connection using the Auto Order Feature

Prerequisites to proceed:

- User should login with CRM credentials
- Should have prior knowledge about the New Permanent Phone Connection
- Users: CSR

To create a New Permanent Phone Connection using the Auto Order feature:

1. Click **Contacts** screen. The Contacts Home View appears.
2. Click **Contacts List** link. The Contacts List View appears.
3. Click **New** (in the upper applet). A blank record is created and is highlighted in yellow.
4. Enter the information in all the mandatory fields: Surname, Name and Preferred Communication.

   Note:

   i. Depending on the Preferred Communication, the corresponding field value should be provided. For example, If you chose the Preferred Communication as Email, then provide information in Email, which then becomes mandatory.
   ii. After you enter the Surname/Name, it becomes a hyperlink. Click the hyperlink to navigate to Detail View.
5. Click **Ctrl + S**. The record is saved.

   Note: To refresh or delete the record you just entered, press **Esc.**
6. Click **Surname**/**Name**. The Contacts Detail View appears. By default, Addresses View is selected.

   Note: In the Detail View, there are several view tabs. Click on any of the view tabs to navigate to the corresponding views. For example, In Contacts screen, if you click Addresses view tab, Contacts – Addresses view appears.
7. Click **New** (in the lower applet). A blank record is created and is highlighted in yellow. By default, the Address Type is selected as Installation Address. Enter the information in the mandatory fields:

   Note:

   i. Enter the address details of the customer in the lower half of the screen.
   ii. Select the appropriate Address Type from the dropdown list. In the House No. /Flat No. field, click the Pick Applet to select or browse the existing address or to provide a new address. Follow Step 7 to create the Billing Address, Billing Corresponding Address which are mandatory.

    iii. Depending on the Main Locality and the Sub Locality provided, the Exchange Name and the PIN fields are auto-populated.

8. Click **Auto Order**. The Orders Detail view appears.

   Note:

   i. The Order Number is auto-populated. The Customer Account, Billing Account and Order Header are created automatically.
   ii. Auto Order feature works for Landline and Wireless Land Line (WLL) connections only.

9. Click **Billing Accounts** view tab. The Orders – Billing Accounts View appears.
10. Enter the information in the mandatory fields: Frequency, Bill Type, Preferred Payment, Bill Media, Bill Period, and Preferred Language Name.
11. Click **Line Items**. The Orders – Line Items View appears.
12. Click **New** (in the lower applet). A new record is created and is highlighted in yellow.
13. Enter the information in the mandatory fields: Nominee Name, Nominee Relation, Usage Code and Product.

    Note: Depending on the Service Type selected, a Product is created and displayed in the List Items. Click Line # to view the details of the Products selected.

14. Click **Customize**. The Product Configuration screen appears. A plan can be selected and customized according to the requirement of the customer.

    Note:

    i. Click **Plans**. The Orders – Land Line plans appear. By default, *None* is selected. Here only one option can be selected. Depending on the Plan selected, the corresponding Facilities, Calling Level, Accessories and Schemes are selected.
    ii. Click Facilities to select one or all among Call Transfer, Call Waiting, Conference, and Calling Line Identification.
    iii. Click Calling Level to select one or all of the customer's choice for Local, STD,
    iv. Incoming Call Barring, Outgoing Call Barring and ISD.
    v. Click Accessories to select one or all of the choices provided.
    vi. Click Centrex Schemes to choose the relevant scheme.
    vii. Click Deposit Schemes to select the schemes.
    viii. Click **Installation Schemes** to select the installation schemes.

15. Click **Done**. If the information provided is accepted, the Orders Detail View appears.
16. Click **Available Numbers**. A list with all the available numbers for that particular exchange is populated.
17. Select one of the numbers from the list or enter the last 4 numbers of the customer's choice in the Preferred Number field. Depending on the availability, the list is populated.

    Note: If the customer requests for 23456789, enter 6789 in the Preferred Number field to see if the number is available.

18. Click **OK**. The number is selected.

    Note: To reserve a number selected, enter a Line Item.

19. Click **Reserve Number**. Once the number is reserved, the Accessory Check button is enabled.
20. Click **Accessory Check**. The Order Sub Status becomes *Accessories Check Done*. The feasibility of the accessories is checked.

    Note: After the Accessory Check is successful, Validate button is enabled.

21. Click **Validate**. If the information provided is complete and correct, then the order is validated. A message *Validations are successful,* appears.

Note: If any of the information is missing, an appropriate message appears. For example, If a plan is not selected, a message, *Select atleast one plan*, appears. Fill in the relevant details and navigate to Orders Detail View and click Validate**.**

22. Click **OK.** The Demand Note button becomes active.
23. Click **Demand Note**. The Demand Note view appears where the demand note which has been generated for the requested services is seen. The Make Payment button is active.
24. Click Make Payment.

    Note:

    i. Based on the service requested, the customer has to pay the deposit as well as the other charges he is entitled to. Once the payment is made, a Receipt Number is auto-populated in CRM.

    ii. This is the reference Number to search a particular record in Clarity for generating a Service Order Number (SO number).

    iii. If the Total Amount in Orders screen is 0.00 only and after the customer's payment details are entered, the Submit Order button is activated

25. Click **Submit Order**. The order is created and submitted. A message, *Order is submitted successfully*, appears.

1.3.2 Creating a New Permanent Phone Connection manually

A new Permanent phone connection can be created manually. In order to create the connection, the details of the customer should be captured in a particular order as given below:

i. Customer Accounts

ii. Addresses

iii. Contacts

iv. Billing Accounts

v. Orders

Prerequisites to proceed:

- User should login with CRM credentials
- Should have prior knowledge about the New Permanent Phone Connection

Users: CSR

To create a new permanent phone connection manually:

1. Click **Customer Accounts**. The Customer Accounts Home View appears.
2. Click **Customer Account List**. The Customer Accounts List View appears.
3. Click **New** (in the upper applet). A blank record is created and is highlighted in yellow.

   Note: Customer Id is auto-populated after the Account details like Account Name and so on are provided and the record is saved. The default value for Status is Prospect.

4. Enter the information in the mandatory fields: Account Name (Surname, Name) and Account Type.

   Note: To refresh or delete the record you just entered, press **Esc** button.

5. Click **Surname**/**Name**. The Customer Accounts Detail View appears. By default, the Account Summary View tab is selected.

   Note:

In the Detail View, there are several view tabs. Click on any of the view tabs to navigate to the corresponding views. For example, In Customer Accounts screen, if you click Account Summary view tab, Customer Accounts – Account Summary View appears.

To create a new connection, the customer has to provide the details in the following view tabs in the Detail View :

- Addresses
- Contacts
- Billing Accounts

6. Click **Addresses**. The Customer Accounts – Addresses view appears.
7. Click **New** (in the lower applet). A blank record is created and is highlighted in yellow. By default, the Address Type is selected as Installation Address. Enter the information in the mandatory fields:

   Note:

   vi. Enter the address details of the customer in the lower half of the screen.

   vii. Select the appropriate Address Type from the dropdown list. In the House No. /Flat No. field, click the Pick Applet to select or browse the existing address or to provide a new address. Follow Step 7 to create the Billing Address, Billing Corresponding Address which are mandatory.

   viii. Depending on the Main Locality and the Sub Locality provided, the Exchange Name and the PIN fields are auto-populated.

8. Click Contacts view tab located next to the Accounts Summary view tab. The Customer Accounts – Contacts View appears.
9. Click **New**. A new record is created and is highlighted in yellow. Enter the information in all the mandatory fields: Surname, Name, Preferred Communication Method, and Preferred Communication Language.
10. Click **Ctrl + S**. The record is saved.
11. Click the dropdown button located next to Payments view tab on the right side of the screen. From the menu, select Billing Accounts. The Customer Accounts – Billing Accounts View appears.
12. Click **New**. A new record is created and is highlighted in yellow.

    Note:

    i. Billing Account, Billing Account Number, Status fields and other fields are auto-populated.

    ii. Provide the information in the mandatory fields: Billing Account Type, Billing Account Sub Type, Frequency, Preferred Language Name, Bill Period, Billing Address, and Billing Corresponding Address.

13. Click **Save** or **Ctrl + S**. The record is saved.
14. Click **Orders** screen. The Orders Home View appears.
15. Click **Orders List** link. The Orders List View appears.

    OR

Click Orders under the Customer Accounts screen. The Orders List View appears.

16. Click **New**. A record with the Customer Name appears.

    Note: Order # is auto-populated along with the other fields.

17. Enter the information in the mandatory fields: Billing Account #, Address and Connection Type as Permanent.

18. Select the Service Line as *Basic Phone Service*; Service as *Wire line*, Service Type as *Landline*, and Service Sub Type as *FLPP*. Select the Service Category depending on the customer.

    Note:

    i. If the Connection Type is Permanent, the End Date field is disabled.

    ii. If the Connection Type is Casual/Temporary, the End Date field is enabled and is mandatory.

19. Click **Order Number**. The Orders – More Info View appears.

20. Click **Line Items**. The Orders – Line Items View appears.

21. Click **New**. A new record is created.

    Note: Line # and Billing Account are auto-populated.

22. Click **Ctrl + S**. The record is saved.

23. Click **Customize**. Select a Plan, Calling Level, Facilities and the remaining tabs depending on the requirement of the customer.

    Note : Under the Facilities tab, depending on service and the plan selected, values are selected by default. Apart from the selected facilities, you can select any of the options provided.

24. To submit the order, See Step 14 to Step 25 in **Creating a New Permanent Phone Connection using the Auto Order Feature.**

1.4 NON Own Your Telephone (NON OYT- GEN)

This is a normal phone connection for which the customer has to pay the deposit before the service is provided.

Prerequisites to proceed:

- User should login with CRM credentials
- Should have prior knowledge about the New Permanent Phone Connection

User: CSR

To create a connection under OYT – General category:

i. Follow Step 1 to Step 12 in Creating a New Permanent Phone Connection using the Auto Order Feature.

26. Select the Service Category as NONOYT-GEN from the dropdown list.

    Note: Select the relevant category according to the requirement from: FREE(either Rent or deposit free service), NONOYT-GEN(deposit or rent applicable), These categories are applicable only for a Permanent Land Line connection.

27. Follow Step 13 to Step 25 in Creating a New Permanent Phone Connection using the Auto Order Feature.

1.5 BSNL Sulabh Plan

A connection under the Sulabh plan has the outgoing facility barred. In other words, under the Sulabh plan, only the incoming facility is provided.

To select the BSNL Sulabh plan:

1. See Step 1 to Step 23 in **Creating a New Permanent Phone Connection manually**

   Note: The user can select the plan according to the requirement.

2. Click **Plans**. A list of landline plans appears. By default, *None* is selected.
3. Select any plan starting with the word Sulabh or Sulab.
4. Click **Facilities** tab to select one or all among Call Transfer, Call Waiting, Conference, and Calling Line Identification features.
5. Click **Calling Level** tab. A list appears.
6. Select one or all of the customer's choice for Local, STD, Incoming Call Barring, Outgoing Call, Barring and ISD.

28. **Note:** If the plan is selected as Sulabh, the Outgoing Call barring field is selected automatically.

7. Click **Accessories**. A list appears. Select one or all of the choices provided.
8. Click **Schemes**. A list appears. Choose the relevant scheme.

   i. To submit the order, Follow Step 16 to Step 25 in Creating a New Permanent Phone Connection using the Auto Order Feature.

1.6 Casual Connection

In this scenario, the customer can request a landline service for a very short period of time. For example, maximum of 30 days. If the customer initially requests for a service for 15 days, the service can be extended upto another 15 days, without exceeding 30 days in all.

1. To select the Connection Type as Casual, See Step 1 to Step16 in **Creating a New Permanent Phone Connection manually**
2. Select the Connection Type as *Casual*.
3. Enter the number of days the casual connection is required in the No. of Days field.
4. To submit the order, See Step 11 to Step 25 in **Creating a New Permanent Phone Connection using the Auto Order Feature.**

1.7 Disconnection due to Misuse

Note: This scenarios is for post production.

The disconnection due to misuse is initiated in the Fraud Management System (FMS). If the service has been misused in any way and it has been detected, then the outgoing is barred for the customer.

Prerequisites: User should have the Service ID # (Phone Number) for which the service is being disconnected.

Users: CSRHYD

To check if the outgoing is barred for a service:

1. Click **Services**. The Services Home View appears.
2. Enter the Service ID in the Service ID (Ph #) field.
3. Click **Go**. The Services Detail View appears with the service associated with the particular Service Id.

   Note:

   i. At this point, the Operating Status indicates OG Barred – MU.
   ii. If the customer continues to misuse the service, the Operating status would indicate IG barred - MU. The customer's incoming and outgoing calls would be barred. If the customer still continues to misuse the service, it would be permanently disconnected.
   iii. For landline and other services such as WLL, the Operating Status would be OG Barred - MU (only outgoing barred) in the beginning where as for a PCO or PT service, the Operating Status would be Suspend – MU (both the incoming and outgoing facility is barred).

1.8 Disconnection due to Non-Payment

The disconnection due to Non-Payment is initiated in the Billing system. It is initiated for the customers who have not made their payments that were due for the past 120 days (6 months).The Billing system sends this data to Clarity and CRM and updates the Opearating Status to *OG barred - NP* initially.

Prerequisites: User should have the Service ID # (Phone Number) for which the service is being disconnected.

Users: CSRHYD

To check whether outgoing is barred for a service:

1. Click **Services**. The Services Home View appears.
2. Enter the Service ID in the Service Id(Ph #) field.
3. Click **Go**. The Services Detail View appears with the service associated with the particular Service Id.

   Note:

   i. Notice the Operating Status as *OG Barred - NP*.
   ii. If the customer does not pay the bill, the Operating status indicates *IG Barred - NP*. The customer's incoming and outgoing calls are barred. If the customer still does not pay for the service, it would be permanently disconnected. A list is generated and CO receives a list of numbers for which the connection is permanently disconnected. CO then raises a permanent disconnection order.
   iii. For landline and other services such as WLL, the Operating Status would be *OG barred - NP* (only outgoing barred) initially. For a PCO or PT service, the Operating Status would be *Suspend - NP* (both the incoming and outgoing facility is barred).

1.9 Reconnection from Safe Custody

Safe Custody: When a customer requests for disconnecting the landline connection temporarily, the connection will be put On Hold or Safe Custody. When the customer requests for the reconnection from the Safe Custody, he has an option to select the previous plan before the Safe custody or can select a new plan.

Note: For Reconnection from Safe Custody**,** the Asset can only be modified. The status of the activity should be either *Cancelled* or *Complete*.

To apply for Safe Custody:

1. Click Customer Accounts screen. The Customer Accounts Home View appears.
2. Click Customer Accounts List link. The Customer Accounts List View appears.
3. Click Accounts Summary View tab. The Customer Accounts – Accounts Summary View appears.

   Note: Only the Asset can be modified.
4. Click **Modify**. The Product Configuration screen appears.
5. Click **Plans** tab. Select the Plan as *Safe Custody*.
6. Click the radio button against the option *LL Safe Custody Rental Plan Urban*.
7. Click **Calling Level** tab. It automatically locks two features, namely:
   - Incoming Call Barring
   - LL Outgoing Call Barring
8. Click **Done**.
9. Click **Orders** screen. The Orders Home View appears
10. Click **Orders List** link. The Orders List View appears.
11. Click **Order #**. The Orders Detail View appears. The Order Type field is *Modify* and the Order Sub-Type field is *Plan Conversion*.
12. Click **Accessory Check**. The accessories requested for are checked.

    Note: The Validate button becomes active.
13. Click **Validate**. A message, *Validations are successful,* appears. This will activate the Demand Note button.
14. Click **Demand Note**. The amount that is due is displayed in the Total Amount field.

    Note: If the total amount displayed is in ( ), as in Rs (399.00), indicates that it is the negative amount. The customer has no balance to pay. If the total amount displayed is Rs 399.00, then the customer has to pay the amount. The Make Payment button is activated. If the customer has any dues or if the balance has to be paid, click Make Payment button. It is optional. Receipt Number is auto-populated.
15. Click **Submit Order**. All the other tabs are inactivated. The Status field becomes *Complete.*
16. Click **Customer Accounts**. The Customer Accounts Home View appears.
17. Click **Customer Accounts List** link. The Customer Accounts List View appears.
18. Select the record. Click **Account Name**. The Customer Accounts Detail View appears.
19. Click **Accounts Summary** view tab. The Customer Accounts – Account Summary View appears.

    Note: Under the Installed Services, the Product should display the Plan that was placed in Safe Custody and the two features that were locked.

To reconnect from Safe Custody:

1. Click **Customer Accounts**. The Customer Accounts Home View appears.
2. Click Customer Accounts List link. The Customer Accounts List View appears.
3. Select the record. Click Account Name. The Customer Accounts Detail View appears.
4. Click Accounts Summary view tab. The Customer Accounts – Account Summary View appears.
5. Click Modify. The Product Configuration screen appears.
6. Click Plans tab. Select the previous plan or a new plan by clicking in the radio button located next to the plan. The corresponding plan is selected.

1.10Disconnection due to Shift

To disconnect a permanent landline connection due to shift:

1. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
2. Click **Customer Accounts List** link. The Customer Accounts List View appears.
3. Click **Accounts Summary** view tab. The Customer Accounts – Accounts Summary view appears.
4. Click **Addresses** view tab. The Customer Accounts – Addresses View appears.
5. Provide the Installation Address, that is, provide the new address where the connection has to be shifted.
6. Click **Shift** tab. Two orders are created.
    - Disconnect Order
    - Reconnect Order
7. Click Shift. The Disconnect Order screen appears.
8. Click **Parent Orders** tab. The Disconnect Order screen appears.

    Note:

    i. For Disconnection due to Shift, Order Type is Shift, and Order Sub Type is Disconnect.

    ii. For Reconnection due to Shift, Order Type is Shift, and Order Sub-Type should be selected from the dropdown list.

1.11Facility Provisioning for Landline

1. Click Customer Accounts screen. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search fields. Click Go. The Customer Accounts - Account Summary View appears.
3. Select Order Sub Type field value as Change in Service.
4. Click Ctrl + S. The record is saved.
5. Click Modify. An order with Order Type as Modify is created. The Orders List View appears.
6. Click Order Number. The Orders Detail View appears.
7. Click Customize. The Product Configuration screen appears.
8. Click Facilities. The facilities enlisted for the current service appear.
9. Select the facilities required. More than one facility can be selected.
10. Click Done. The Orders Detail View appears. The details of the current order being created appear.
11. Click Accessory Check. The feasibility of the new facility is verified. The Sub Status changes from Pending to Accessory Check Done.

12. Click Validate. All the mandatory changes made are verified. The Sub Status changes to *Validation Successful*. If the validations are successful, a message, *Validations are successful*, appears.
13. Click **Demand Note**. The Demand Note is generated for the requested facility.

    Note: The Orders – Demand Note View appears. A record with the Demand Note Number and the Amount, if any, to be paid by the customer appears

9. Click **Submit Order.** The order is submitted to the downstream systems.

    Note: The Status is *Submission In Progress* and the Sub Status is *Validation Successful*. The Status becomes *In Progress* and *Completed* thereafter, indicating that the order is completed after which the facility is provisioned for the customer. Once the order is completed, the view becomes non-editable.

10. Click **Milestones** view tab. The Orders – Milestones View appears.

    Note: The Type field indicates the downstream systems with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status in the upper applet is *Completed*, it indicates that the order has been completed.

11. Copy (**Ctrl + C**) the phone number of the customer from the Service Id (Ph #) field.
12. Click **Services** screen. The Services List View appears.
13. Paste (**Ctrl + V**) the copied phone number in the Service Id (Ph #) field. A record with that particular phone number where Status is *Active*, appears.
14. Click the corresponding Service **#**. The Services – Components view appears.

    Note: In the Components applet, under the Product field, the facility that has been added where the Status as *Active* is seen.

1.12Facility Disconnection for Landline

In this scenario, the customer requests for disconnecting the facilities provided with the existing service. Facilities include Outgoing Call Barring, Calling Line Identification, Incoming Call Barring and so on.

Prerequisites to proceed: The customer should have an existing:

- Permanent landline connection
- Facility/facilities that are being disconnected

Users: CSR

To disconnect an existing facility:

1. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search fields.
3. Click **Go.** The Customer Accounts – Accounts Summary View appears.
4. Select Order Sub Type field value as *Change in Service*.
5. Click **Ctrl + S**. The record is saved.
6. Click **Modify**. An order with Order Type as Modify is created. The Orders List View appears.
7. Click **Order Number**. The Orders Detail view appears.
8. Click **Customize**. The Product Configuration screen appears.
9. Click **Facilities**. The facilities enlisted for the current service appear.

10. Unselect the facilities to be removed. More than one facility can be unselected.
11. Click **Done**. The Orders Detail View appears. The details of the current order being created appear.
12. Click **Accessory Check**. The Sub Status changes from *Pending* to *Accessory Check Done*.
13. Click **Validate**. All the mandatory changes made are verified.
14. **Note:** The Sub Status changes to *Validation Successful*. If the validations are successful, a message, *Validations are successful*, appears.
15. Click **Demand Note**. The Orders – Demand Note View appears. The Demand Note is generated for the requested facility.
16. **Note:** A record with Demand Note Number and the Amount, if any, to be paid by the customer appears.
17. Click **Submit Order**. The order is submitted to the downstream systems.

    Note: The Status is *Submission In Progress*, and the Sub Status is *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter, indicating that order is completed after which the facility is provisioned for the customer. Once the order is completed, the view becomes non-editable.
18. Click **Milestones** view tab. The Orders – Milestones View appears.
19. **Note:** The Type field indicates the downstream systems with which the order is pending. The Status field indicates the status of the order in that respective system. For example, if the Status field in the upper applet is *Completed*, it indicates that the order has been completed.
20. Copy (**Ctrl + C**) the phone number of the customer from the Service Id (Ph #) field.
21. Click **Services** screen. The Services Home View appears.
22. Click **Services List** link. The Services List View appears.
23. Paste (**Ctrl + V**) the copied phone number in the Service Id (Ph #) field. A record with the phone number where Status is *Active*, appears.
24. Click the corresponding Service #. The Services – Components View appears.
25. **Note:** In the Components applet, under the Product field, the facilities disconnected with Status as *Inactive* appears.

1.13Accessory Provisioning for Landline

In this scenario, the customer can request for additional accessories to the existing service.

Prerequisites to proceed: The customer should have a permanent landline provisioned and the accessory/accessories that are being disconnected should exist.

Users: CSR

To provision a new accessory for a landline connection:

1. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search fields.
3. Click **Go.** The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type field value as *Change in Service*.
5. Click **Ctrl + S**. The record is saved.
6. Click **Modify**. An order with Order Type as Modify is created. The Orders List View appears.
7. Click **Order Number**. The Orders Detail view appears.
8. Click **Customize**. The Product Configuration screen appears.
9. Click **Accessories**. The accessories enlisted for the landline service are:
    - LL CLI PHONE
    - LL NON CLI PHONE

By default, LL NON CLI PHONE is selected.

10. Select the Accessories. More than one accessory can be selected.
11. Click **Done**. The Orders Details View appears. The details of the current order being created appear.
12. Click **Accessory Check**. The Sub Status field changes from *Pending* to *Accessory Check Done*.
13. Click **Validate**. All the mandatory changes made are verified.

    Note: Sub Status field changes to *Validation Successful*. If the validations are successful, a message, *Validations are successful,* appears.

14. Click **Demand Note**. The Orders – Demand Note View appears. The Demand Note is generated for the requested facility.

    Note: A record with Demand Note Number and the Amount, if any, to be paid by the customer appears.

15. Click **Submit Order**. The order is submitted to the downstream systems.

    Note: The Status field becomes *Submission In Progress* and the Sub Status field becomes *Validation Successful*. The Status field becomes *In Progress* and *Completed*, thereafter indicating that the order is completed after which the accessory is provisioned for the customer. Once the order is completed, the view becomes non-editable.

16. Click **Milestones** view tab. The Orders – Milestones View appears.

    Note: The Type field indicates the downstream systems with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view is *Completed*, Status field in the upper applet is *Completed* indicates that the order has been completed.

17. Copy (**Ctrl + C**) the phone number of the customer from the Service Id (Ph #) field.
18. Click **Services** screen. The Services Home View appears.
19. Click **Services List** link. The Services List View appears.
20. Paste (**Ctrl + V**) the copied phone number in the Service Id (Ph #) field. A record with the phone numbers where Status is *Active* appears.
21. Click the corresponding Service #. The Services – Components View appears.

    Note: In the lower applet, under the Product field, the accessory which has been added with the Status as *Active* appears.

1.14 Accessory Disconnection for Landline

In this scenario, the customer requests for disconnecting the accessories that were provided with the existing service.

Prerequisites to proceed: The customer should have an exisiting:

- Permanent landline connection
- Accessory/accessories being disconnected

Users: CSR

To disconnect an existing accessory for a landline connection:

1. Click **Customer Accounts** screen. The Customer Accounts Home View appears.

2. Enter any or all of the values in the Search fields.
3. Click **Go.** The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type field value as *Change in Service*.
5. Click **Ctrl + S**. The record is saved.
6. Click **Modify**. An order with Order Type as Modify is created. The Orders List View appears.
7. Click **Order Number**. The Orders Detail view appears.
8. Click **Customize**. The Product Configuration screen appears.
9. Click **Accessories**. The accessories for the landline service are:
    - LL CLI PHONE
    - LL NON CLI PHONE
10. Unselect the accessories required to be disconnected. More than one accessory can be disconnected.
11. Click **Done.** The Orders Detail View appears. The details of the current order being disconnected appear.
12. Click **Accessory Check**. The Sub Status field changes from *Pending* to *Accessory Check Done*.
13. Click **Validate**. The mandatory changes have been made are verified.

    Note: The Sub Status changes to *Validation Successful*. If the validations are successful, a message, *Validations are successful,* appears.
14. Click **Demand Note**. The Demand Note View appears. The Demand Note for the difference in the amounts is generated.

    Note: A record with the Demand Note Number and the Amount if any, to be paid by the customer, appears.
15. Click **Submit Order**. The order is submitted to the downstream systems.

    Note: The Status field displays *Submission In Progress* and Sub Status field displays *Validation Successful.* The Status field becomes *In Progress* and *Completed* thereafter indicating that the order is completed after which the accessory is disconnected for the customer. Once the order is completed, the view becomes non-editable. .
16. Click **Milestones** view tab. The Orders – Milestones View appears.

    Note: The Type field indicates the downstream systems with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field indicates *Completed*, the Status field in the upper applet indicates *Completed*, indicating that the order has been completed.
17. Copy (**Ctrl + C**) the phone number of the customer from Service Id (Ph #).
18. Click **Services** screen. The Services Home View appears.
19. Click **Services List** link. The Services List View appears.
20. Paste (**Ctrl + V**) the copied phone number in the Service Id (Ph #) field. A record with the phone number where Status is *Active* appears.
21. Click the corresponding Service #. The Services – Components appears.

    Note: In the lower applet, under the Product field, the accessory which has been added with the Status as *Inactive* appears.

1.15Voluntary Disconnection of Landline(Permanent Disconnection of Landline)

In this scenario, the customer can request for disconnecting all the existing services from BSNL. Although the customer chooses to disconnect the services voluntarily, CSRRTN intervenes to check if the customer can be retained.

Prerequisites to proceed: The customer should have an existing Landline connection.

Users: CSR, CSRRTN

To close or disconnect a landline connection permanently:

User: CSR

i. Click **Customer Accounts** screen. The Customer Accounts Home View appears.

ii. Enter any or all of the values in the Search fields.

iii. Click **Go.** The Customer Accounts – Account Summary View appears.

1. Select Order Sub Type as *Disconnect*.

2. Click **Disconnect**. An order with Order Type as Disconnect is created. The Orders Detail View appears.

   Note: The Order Type and Order Sub Type field is *Disconnect*. Every field is non-editable for a disconnection order except for the Customer Requested Date field because it indicates the date from which the service can be disconnected. An activity for CSRRTN is created for approval or rejection of the order. Click Orders – Activities View to see the activity.

3. Change the Customer Requested Date field, if required.

4. Click **Validate**. A message, *Validations are successful*, appears.

   Note: The Submit button becomes active. An alert, *There is a non-closed activity*, appears as long as the Status field of the activity in the Activities view is *Open*.

User: CSRRTN

5. Login as CSRRTN user. The CSRRTN Home View appears.

   Note: Under the Activities section, the first record is the last activity created by CSR for CSRRTN.

6. Click the activity. The Orders – Activities View appears.

   Note: The Type for the permanent disconnection is *Retention Approval*.

7. Enter comments in the Comments field which is mandatory.

8. Click **Approve**.

   Note: The disconnection process is approved. The Status field changes to *Approved* and the order is submitted to downstream systems. The Status field becomes In Progress and Completed,

thereafter indicating that the order is completed after which the service is permanently disconnected for the customer.

9. Click **Milestones** view tab. The Orders – Milestones View appears. Note:

   Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays Completed, the Status field in the upper applet also displays Completed indicating that the order has been completed. Once the order is completed, the view becomes non-editable.

10. Copy (**Ctrl + C**) the phone number of the customer from the Service Id (Ph #) field.
11. Click **Services** screen. The Services Home View appears.
12. Click **Services List** link. The Services List View appears.
13. Paste (**Ctrl + V**) the copied phone number in the Service Id (Ph #) field. A record with the phone number where Status is *Inactive* appears.
14. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
15. Enter any or all the values in the Search fields.
16. Click **Go**. The Customer Accounts – Account Summary View appears. No Landline record appears here, indicating that the service has been permanently removed.
17. Click **Reject.** The disconnection process is rejected. The Status changes to *Rejected.*

    Note: The Status field of the Activities view displays *Closed.* The Status field of the upper applet displays *Cancelled* indicating that the disconnection process has been cancelled.

18. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
19. Enter the Account Name. Click **Go**. The Customer Accounts – Account Summary View appears.

    Note: Under the Installed Services, the service on which the Disconnect order was raised is no longer exists.

1.16Shift of Landline within the Exchange(without number change)

In this scenario, the customer can change the address within the same exchange and can retain the same phone number. Before the Shift process starts, the new Installation Address should be provided in the Contacts – Addresses View for that particular customer. If not, it has to be provided in the Orders Detail View.

Prerequisites to proceed: The customer should have an existing permanent landline connection.

Users: CSR, AOTR

To Shift within the same exchange and without changing the number:

User: CSR

1. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search Criteria.
3. Click **Go**. The Customer Accounts – Accounts Summary View appears.
4. Click **Addresses** view tab. The Customer Accounts – Addresses View appears.
5. Click **New**. A blank record is created and is highlighted in yellow. By default, Address Type field is Installation Address.
6. Click **Account Summary** view tab. The Customer Accounts – Account Summary View appears, displaying the services given to that particular customer.
7. Select the Order Sub Type field as *Shift Within exch w/o NumChg*.
8. Click **Shift**. Two orders are created and an activity is created for the AOTR which needs to be approved before the order is submitted.

   Note:

   i. First, an order with the Order Type as *Shift* and Order Sub Type as *Shift Within exch w/o NumChg* (Child order or Reconnection order) is created. This order is the connection at the new address.
   ii. Second, an order with the Order Type as Shift and Order Sub Type as Disconnect (Parent order or Shift-Disconnect order) is created. This order is the disconnection at the old address.
   iii. The Orders Detail View of the Child Order appears.
   iv. The user need not work on the parent (or disconnect) order, as it is submitted automatically.
9. Select **Nature Of Shift** field under the More Info view tab. The options are:
   - Shift CRD
   - Shift when Feasible
   - Shift Immediate
   - **Note**: Nature Of Shift is selected only for Reconnect order and not Disconnect order.

- ***If Nature of Shift is Shift CRD***:

In this scenario, shift takes place on the date requested by the customer. The Accessory Check button is active.

a) Change the installation address.

   Note: If the address is not changed, an alert is generated, indicating that the installation address needs to be changed.

b) Click **Accessory Check**. The Sub Status field changes from *Pending* to *Accessories Check Done*.

c) Change the Customer Requested Date field to the date requested by the customer.

   Note: Change in this field can be made only after Accessory Check is completed and before you click the Validate button.

d) Click **Validate**. A message, *All validations are successful*, appears.

User: AOTR

e) Login as AOTR. The AOTR Home View appears.

f) Under Activities, click the activity which needs to be approved for shift. The Orders – Activities View of the Parent (disconnect) order appears. .

   Note: The Type field for shift will be *Shift Approval*.

g) Click either Approve or Reject to approve and reject the activity respectively.

   i. Note:

   ii. If you click the Reject button, the Status of the activity is Rejected and both the Reconnect and Disconnect orders has the Status as Cancelled, indicating that neither service for the old address has been disconnected nor the connection for the new address connection is done.

   iii. If you click the Approve button, the Status of the activity becomes Approved.

User: CSRHYD

h) Login as CSRHYD. The CSRHYD Home View appears.

   Note: After approval by AOTR, the activity needs to be closed by the CSRHYD

i) Under Activities, click the activity which has to be closed. The Orders – Activities View of the parent (disconnect) order appears. The Close button is enabled.

j) Click **Close**. The Status of the activity is *Closed*.

k) Click **Child Orders** view tab. The Orders – Child Orders View appears. In the lower applet, the Child (or Reconnect) order can be seen.

l) Click **Order Number**. The Orders - Child Order Detail View appears.

m) Click **Submit Order**. The order is submitted to the downstream systems in accordance with the dates (Customer Requested Date in the Re-connect and Disconnect orders) set by the user.

   Note: The Status field displays *Submission In Progress* and the Sub Status field displays *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter indicating that both the child and parent orders are completed. Once the order is completed, the view becomes completely non-editable.

n) Click **Milestones** view tab. The Orders – Milestones View appears.

   Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet displays *Completed* indicating that the order has been completed.

- ***If the Nature of Shift is Shift When Feasible***:

In this scenario, the shift takes place whenever it is feasible for BSNL. The Accessory Check button is active.

a) Change the installation address.

Note: If the address is not changed, an alert is generated, indicating that the installation address needs to be changed.

b) Click **Accessory Check**. The Sub Status field changes from *Pending* to *Accessories Check Done.*

c) Click **Validate**. A message, *All validations are successful,* appears.

User: AOTR

d) Login as AOTR. The AOTR Home View appears.

e) Under Activities, click the activity which needs to be approved for shift. The Orders – Activities View of the Parent (Disconnect) order appears.

Note:

i The Type for shift will be Shift Approval.
ii If you click the **Reject** button, the Status of the activity is *Rejected* and both the Reconnect and Disconnect orders has the Status as *Cancelled*, indicating that neither service for the old address has been disconnected nor the connection for the new address connection is done.
iii If you click the Approve button, the Status of the activity becomes *Approved.*

User: CSRHYD

f) Login as CSRHYD. The CSRHYD Home View appears.

Note: After approval by AOTR, the activity should be closed by CSRHYD.

g) Under Activities, click the activity which has to be closed. The Orders – Activities View of the Parent (Disconnect) order appears. The Close button is enabled.

h) Click **Close**. The Status of the activity is *Closed*.

i) Click **Child Orders** view tab. The Orders – Child Orders View appears. In the lower applet, the Child (or Reconnect) order can be seen.

j) Click **Order Number**. The detail view of the child (or reconnect) order appears.

k) Click **Submit Order**. The order is submitted to the downstream systems.

Note: The Status field displays *Submission In Progress* and the Sub Status field displays *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter

indicating that both the child and the parent orders are completed. Once the order is completed, the view becomes completely non-editable.

l) Click **Milestones** view tab. The Orders – Milestones View appears.

Note: The Type field indicates the downstream systems with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet also displays *Completed* indicating that the order has been completed.

- ***If the Nature of Shift is Shift Immediate***:

In this scenario, the user can complete the disconnect order (parent order) before the child order as the Submit Order button and the Available Numbers button are both active.

a) Change the installation address.

Note: If the address is not changed, an alert is generated, indicating that the installation address needs to be changed.

b) Click **Accessory Check**. The Sub Status field changes from *Pending* to *Accessories Check Done*.

Note: If an alert is generated to remove the accessories which have status as *Not Feasible,* then the accessories under Line Items with Status field as *Delete* should be removed and then click Accessory Check.

c) Click **Validate**. A message, indicating all validations are successful, appears.

User: AOTR

d) Login as AOTR. The AOTR Home View appears.

e) Under Activities, click the activity which has to be approved for shift. The Orders – Activities View of the Parent (disconnect) order appears.

Note:

i The **Type** for shift will be *Shift Approval*.
ii If you click the **Reject** button, the Status of the activity is *Rejected* and both the Reconnect and Disconnect orders has the Status as *Cancelled*, indicating that neither service for the old address has been disconnected nor the connection for the new address connection is done.
iii If you click the Approve button, the Status of the activity becomes *Approved.*

User: CSRHYD

f) Login as CSRHYD. The CSRHYD Home View appears.

Note: After approval by AOTR, the activity should to be closed by CSRHYD.

g) Under Activities, click the activity which has to be closed. The Orders – Activities View of the Parent (disconnect) order appears. The Close button is enabled.

h) Click **Close**. The activity Status will be *Closed*.

i) Click Child Orders view tab. The Orders – Child Orders View appears. In the lower applet, the child (or reconnect) order can be seen.

j) Click **Order Number**. The Orders Detail View of the child (or reconnect) order appears.

k) Click **Submit Order**. The order is submitted to the downstream systems.

Note: The Status field displays *Submission in Progress* and the Sub Status field displays *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter indicating that both the parent and the child orders are completed. Once the order is completed, the view becomes completely non-editable.

l) Click **Milestones** view tab. The Orders – Milestones View appears.

Note: The Type field indicates the downstream systems with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet displays *Completed* indicating that the order has been completed.

1.17 Shift of Landline within the Exchange(with number change)

In this scenario, the customer can change the address within the same exchange and change the existing phone number. Before the Shift process starts, the New Installation Address should be provided in the Contacts – Addresses View for that particular customer. If not, it has to be provided in the Orders Detail View.

Prerequisites to proceed: Customer should have a permanent landline provisioned.

Users: CSR

To Shift within the same exchange and with number change:

- i Click **Customer Accounts** screen. The Customer Accounts Home View appears.
- ii Enter any or all of the values in the Search Criteria.
- iii Click **Go**. The Customer Accounts – Accounts Summary View appears.
- iv Click **Addresses** view tab. The Customer Accounts – Addresses View appears.

1. Click **Account Summary** view tab. The Customer Accounts – Account Summary View appears where the services provided to that particular customer appears.

2. Select the Order Sub Type field as *Shift Within exch w/o NumChg.*

3. Click **Shift**. Two orders are created and an activity is created under the parent (disconnect) order.

   i. First, an order with the Order Type as *Shift* and Order Sub Type as *Shift Within exch with NumChg* (Child order or Reconnection order) is created.

   ii. Second, an order with the Order Type as *Shift* and Order Sub Type as *Disconnect* (Parent order or Shift-Disconnect order) is created

Note: The Orders Detail View of the Child Order appears. The Available Numbers button is active.

4. Select a new installation address in from the Address pick applet. The address is selected.
5. Select the Nature Of Shift field under the More Info view tab. The options are:
    - Shift CRD
    - Shift when Feasible
    - Shift Immediate
    - ***If the Nature of Shift is Shift CRD:*** In this scenario, the Available Numbers button is active.

a) Click **Available Numbers**. A list containing the phone numbers available in the current exchange appears.

b) Select a number from the list. The selected number is populated in Service Id (Ph #) field.

c) Click **Reserve Number**. The Sub Status field becomes *Port Available*.

d) Click **Accessory Check**. The Sub Status field changes to *Accessories Check Done*.

e) Change the Customer Requested Date to the date requested by the customer. It cannot be less than the current date.

f) Click **Validate**. A message, *All validations are successful*, appears.

Note: The Sub Status field changes to *Validation Successful*.

User: AOTR

g) Login as AOTR. The AOTR Home View appears.

m) Under Activities, click the activity which has to be approved for shift. The Orders – Activities View of the Parent (disconnect) order appears.

Note: The **Type** for shift will be *Shift Approval*.

i If you click the **Reject** button, the Status of the activity is *Rejected* and both the Reconnect and Disconnect orders has the Status as *Cancelled*, indicating that neither service for the old address has been disconnected nor the connection for the new address connection is done.

ii If you click the **Approve** button, the Status of the activity becomes *Approved.*

User: CSRHYD

h) Login as CSRHYD. The CSRHYD Home View appears.

Note: After AOTR approves, the activity has to be closed by CSRHYD.

i) Under **Activities,** click the activity which has to be closed. The Orders – Activities View of the Parent (Disconnect) order appears. The **Close** button is enabled.

j) Click **Close**. The activity Status is *Closed*.

k) Click Child Orders view tab. The Orders – Child Orders View appears.

Note: In the lower applet, the child (or reconnect) order is seen.

l) Click **Order Number**. The Orders Detail View of the Child (Reconnect) order appears.

m) Click **Submit Order**. The order is submitted to the downstream systems.

Note: The Status field displays *Submission In Progress* and the Sub Status field displays, *Validation Successful*. The Status field value becomes *In Progress* and *Completed* thereafter indicating that both the child and the parent orders are completed. Once the order is completed, the view becomes completely non-editable. .

n) Click **Milestones** view tab. The Orders – Milestones View appears.

Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet displays *Completed* indicating that the order has been completed.

- ***If the Nature of Shift is Shift When Feasible:***

a) Click **Available Numbers**. A list containing phone numbers available in the current exchange appears.

b) Select a number from the list. The selected number is populated in Service Id (Ph #) field.

c) Click **Reserve Number**. The Sub Status field becomes *Port Available*.

d) Click **Accessory Check**. The Sub Status field changes to *Accessories Check Done*.

e) Click **Validate**. An alert, *All the Validations are successful,* appears.

Note: The Sub Status field changes to *Validation Successful*.

User: AOTR

f) Login as AOTR. The AOTR Home View appears.

n) Under Activities, click the activity which has to be approved for shift. The Orders – Activities View of the Parent (disconnect) order appears.

Note:

i The **Type** for shift will be *Shift Approval*.
ii If you click the **Reject** button, the Status of the activity is *Rejected* and both the Reconnect and Disconnect orders has the Status as *Cancelled*, indicating that neither service for the old address has been disconnected nor the connection for the new address connection is done.
iii If you click the Approve button, the Status of the activity becomes *Approved.*

User: CSRHYD

g) Login as CSRHYD. The CSRHYD Home View appears.

Note: After AOTR approves, the activity has to be closed by CSRHYD.

h) Under **Activities,** click the activity which has to be closed. The Orders – Activities View of the Parent (disconnect) order appears. The **Close** button is enabled.

i) Click **Close**. The activity Status is *Closed*.

j) Click Child Orders view tab. The Orders – Child Orders View appears.

Note: In the lower applet, the child (or reconnect) order can be seen.

k) Click **Order Number**. The detail view of the child (or reconnect) order appears.

l) Click **Submit Order**. The order is submitted to the downstream systems.

Note: The Status field displays *Submission In Progress* and the Sub Status field displays *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter indicating that the child and the parent orders are completed. Once the order is completed, the view becomes completely non-editable.

m) Click **Milestones** view tab. The Orders – Milestones View appears.

Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this View displays *Completed*, the Status field in the upper applet also displays *Completed* indicating that the order has been completed.

- ***If the Nature of Shit is Shift Immediate:***

Note:

i. The user can complete the disconnect order (parent order) before the child order as the Submit Order button and the Available Numbers button are both active.

ii. Change the installation address, failing which an alert is generated that the installation address needs to be changed.

a) Click **Available Numbers**. A list containing phone numbers available in the current exchange appears.

b) Click **Reserve Number**. The Sub Status field becomes *Port Available*.

c) Select a number from the list. The selected number is populated in Service Id (Ph #) field.

d) Click **Accessory Check**. The Sub Status field changes to *Accessories Check Done*.

e) Click **Validate**. An alert, *Validations are successful,* appears.

Note: The Sub Status field changes to *Validation Successful*.

User: AOTR

f) Login as AOTR. The AOTR Home View appears.

g) Under Activities, click the activity which has to be approved for shift. The Orders – Activities View of the Parent (disconnect) order appears.

Note:

i The **Type** for shift will be *Shift Approval*.
ii If you click the **Reject** button, the Status of the activity is *Rejected* and both the Reconnect and Disconnect orders has the Status as *Cancelled*, indicating that neither service for the old address has been disconnected nor the connection for the new address connection is done.
iii If you click the Approve button, the Status of the activity becomes *Approved.*

User: CSRHYD

h) Login as CSRHYD. The CSRHYD Home View appears.

Note: After approval by AOTR, the activity needs to be closed by the CSRHYD

i) Under **Activities,** click the activity which has to be closed. The Orders – Activities View of the Parent (disconnect) order appears. The **Close** button is enabled.

j) Click **Close**. The activity Status is *Closed*.

k) Click the Child Orders view tab. The Orders – Child Orders View appears.

Note: In the lower applet, the child (or reconnect) order is seen.

l) Click **Order Number**. The Orders Detail View of the child (or reconnect) order appears.

m) Click **Submit Order**. The order is submitted to the downstream systems. The Status field displays *Submission In Progress* and the Sub Status field displays, *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter indicating the completion of the parent and child order. Once the order is completed, the view becomes completely read only for the user.

n) Click **Milestones** view tab. The Orders – Milestones View appears.

Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet also displays *Completed* indicating that the order has been completed.

1.18 Shift of Landline Across Exchanges with number change(and within zones)

In this scenario, the customer can change the address within the same exchange and change the existing phone number. Before the Shift process starts, the New Installation Address should be provided in the Contacts – Addresses View for that particular customer. If not, it has to be provided in the Orders Detail View.

Prerequisites to proceed: Customer should have a permanent landline provisioned.

Users: CSR

To Shift across exchanges with number change:

1. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search Criteria.
3. Click **Go**. The Customer Accounts – Accounts Summary View appears.
4. Click **Addresses** view tab. The Customer Accounts – Addresses View appears.
5. Click **Account Summary** view tab. The Customer Accounts – Account Summary View appears where the services provided to that particular customer appears.
6. Select the Order Sub Type field as *Shift Across exchanges.*
7. Click **Shift**. Two orders are created and an activity is created under the parent(disconnect) order.
   i. First, an order with the Order Type as *Shift* and Order Sub Type as *Shift Across exchanges* (Child order or Reconnection order) is created.
   ii. Second, an order with the Order Type as Shift and Order Sub Type as Disconnect (Parent order or Shift-Disconnect order) is created

Note: The Orders Detail View of the Child Order appears. The Available Numbers button is active.

10. Select a new installation address from the Address pick applet. The new address is selected.
11. Select the Nature Of Shift field under the More Info view tab. The options are:
    - Shift CRD
    - Shift when Feasible
    - Shift Immediate
    - ***If the Nature of Shift is Shift CRD:*** In this scenario, the Available Numbers button is active.

    i Click **Available Numbers**. A list containing the phone numbers available in the current exchange appears.

    ii Select a number from the list. The selected number is populated in Service Id (Ph #) field.

    iii Click **Reserve Number**. The Sub Status field becomes *Port Available*.

    iv Click **Accessory Check**. The Sub Status field changes to *Accessories Check Done*.

    v Change the Customer Requested Date to the date requested by the customer. It cannot be less than the current date.

    vi Click **Validate**. An alert, indicating that all validation are successful is generated.

Note: The Sub Status field changes to *Validation Successful*.

User: AOTR

i. Login as AOTR. The AOTR Home View appears.

ii. Under Activities, click the activity which has to be approved for shift. The Orders – Activities View of the Parent (disconnect) order appears.

Note:

i The **Type** for shift will be *Shift Approval*.

ii If you click the **Reject** button, the Status of the activity is *Rejected* and both the Reconnect and Disconnect orders has the Status as *Cancelled*, indicating that neither service for the old address has been disconnected nor the connection for the new address connection is done.

iii If you click the Approve button, the Status of the activity becomes *Approved.*

User: CSRHYD

i. Login as CSRHYD. The CSRHYD Home View appears.

Note: After approval by AOTR, the activity has to be closed by CSRHYD.

ii. Under **Activities,** click the activity which has to be closed. The control navigates to the Activities view of the parent (disconnect) order. The **Close** button is enabled.

iii. Click **Close**. The activity Status will be *Closed*.

iv. Click Child Orders view tab. The Orders – Child Orders View appears.

Note: In the lower applet, the child (or reconnect) order is seen.

v. Click **Order Number**. The Orders Detail View of the child (or reconnect) order appears.

vi. Click **Submit Order**. The order is submitted to the downstream systems.

Note: The Status field displays *Submission In Progress* and the Sub Status field displays, *Validation Successful*. The Status field value becomes *In Progress* and *Completed* thereafter indicating that both the child and the parent orders are completed. Once the order is completed, the view becomes completely non-editable. .

vii. Click **Milestones** view tab. The Orders – Milestones View appears.

Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet displays *Completed* indicating that the order has been completed.

viii. ***If the Nature of Shift is Shift When Feasible:***

b) Click **Available Numbers**. A list containing phone numbers available in the current exchange appears.

c) Select a number from the list. The selected number is populated in Service Id (Ph #) field.

d) Click **Reserve Number**. The Sub Status field becomes *Port Available*.

e) Click **Accessory Check**. The Sub Status field changes to *Accessories Check Done*.

f) Click **Validate**. An alert, *All the Validations are successful,* appears.

Note: The Sub Status field changes to *Validation Successful*.

User: AOTR

g) Login as AOTR. The AOTR Home View appears.

h) Under Activities, click the activity which has to be approved for shift. The Orders – Activities View of the Parent (disconnect) order appears.

Note:

i. The **Type** for shift will be *Shift Approval*.
ii. If you click the **Reject** button, the Status of the activity is *Rejected* and both the Reconnect and Disconnect orders has the Status as *Cancelled*, indicating that neither service for the old address has been disconnected nor the connection for the new address connection is done.
iii. If you click the Approve button, the Status of the activity becomes *Approved.*

User: CSRHYD

i) Login as CSRHYD. The CSRHYD Home View appears.

Note: After AOTR approves, the activity has to be closed by CSRHYD.

j) Under **Activities,** click the activity which has to be closed. The Orders – Activities View of the Parent (disconnect) order appears. The **Close** button is enabled.

k) Click **Close**. The activity Status is *Closed*.

l) Click Child Orders view tab. The Orders – Child Orders View appears.

Note: In the lower applet, the child (or reconnect) order is seen.

m) Click **Order Number**. The Orders Detail View of the Child (or reconnect) order appears.

n) Click **Submit Order**. The order is submitted to the downstream systems.

Note: The Status field displays *Submission In Progress* and the Sub Status field displays *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter

indicating that the child and the parent orders are completed. Once the order is completed, the view becomes completely non-editable.

o) Click **Milestones** view tab. The Orders – Milestones View appears.

Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this View displays *Completed*, the Status field in the upper applet also displays *Completed* indicating that the order has been completed.

i ***If the Nature of Shit is Shift Immediate:***

Note:

i. The user can complete the disconnect order (parent order) before the child order as the Submit Order button and the Available Numbers button are both active.

ii. Change the installation address, failing which an alert is generated that the installation address needs to be changed.

a) Click **Available Numbers**. A list containing phone numbers available in the current exchange appears.

b) Click **Reserve Number**. The Sub Status field becomes *Port Available*.

c) Select a number from the list. The selected number is populated in Service Id (Ph #) field.

d) Click **Accessory Check**. The Sub Status field changes to *Accessories Check Done*.

e) Click **Validate**. An alert, *Validations are successful,* appears.

Note: The Sub Status field changes to *Validation Successful*.

User: AOTR

f) Login as AOTR. The AOTR Home View appears.

g) Under Activities, click the activity which has to be approved for shift. The Orders – Activities View of the Parent (disconnect) order appears.

Note:

iv. **Type** for shift will be *Shift Approval*.

v. If you click the **Reject** button, the Status of the activity is *Rejected* and both the Reconnect and Disconnect orders has the Status as *Cancelled*, indicating that neither service for the old address has been disconnected nor the connection for the new address connection is done.

vi. If you click the Approve button, the Status of the activity becomes *Approved.*

User: CSRHYD

h) Login as CSRHYD. The CSRHYD Home View appears.

Note: After AOTR approves, the activity has to be closed by CSRHYD.

i) Under **Activities,** click the activity which has to be closed. The Orders – Activities View of the Parent (disconnect) order appears. The **Close** button is enabled.

j) Click **Close**. The activity Status will be *Closed*.

k) Click Child Orders view tab. The Orders – Child Orders View appears.

Note: In the lower applet, the child (or reconnect) order can be seen.

l) Click **Order Number**. The Orders Detail View of the Child (or reconnect) order appears.

m) Click **Submit Order**. The order is submitted to the downstream systems. The Status field displays *Submission In Progress* and the Sub Status field displays, *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter indicating the completion of the parent and child order. Once the order is completed, the view becomes completely read only for the user.

n) Click **Milestones** view tab. The Orders – Milestones View appears.

Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet also displays *Completed* indicating that the order has been completed.

1.19 Shift of Landline Across Exchanges without number change(and within zones)

In this scenario, the customer can change the address within the same exchange and change the existing phone number. Before the Shift process starts, the New Installation Address should be provided in the Contacts – Addresses View for that particular customer. If not, it has to be provided in the Orders Detail View.

Prerequisites to proceed: Customer should have a permanent landline provisioned.

Users: CSR

To Shift across exchanges without number change:

1. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search Criteria.
3. Click **Go**. The Customer Accounts – Accounts Summary View appears.
4. Click **Addresses** view tab. The Customer Accounts – Addresses View appears.
5. Click **Account Summary** view tab. The Customer Accounts – Account Summary View appears where the services provided to that particular customer appears.
6. Select the Order Sub Type field as *Shift Across exchanges.*
7. Click **Shift**. Two orders are created and an activity is created under parent (disconnect) order.

i. First, an order with the Order Type as *Shift* and Order Sub Type as *Shift Across exchanges* (Child order or Reconnection order) is created.

ii. Second, an order with the Order Type as *Shift* and Order Sub Type as *Disconnect* (Parent order or Shift-Disconnect order) is created

Note: The Orders Detail View of the Child Order appears. The Available Numbers button is active.

8. Select a new installation address from the Address pick applet.
9. Select the Nature Of Shift field under the More Info view tab. The options are:
   - Shift CRD
   - Shift when Feasible
   - Shift Immediate
   - ***If the Nature of Shift is Shift CRD:*** In this scenario, the Available Numbers button is active.

a) Click **Available Numbers**. A list of numbers appears.

Note:

i. If the exchange happens without the number change, the list of new numbers does not appear. An alert that the existing number can continue to be in use appears. Click the Reserve Number button.
ii. If the existing number in the old address cannot be used for the new address, then the list of new numbers appears, indicating that the old number cannot continue to be present at the new address.

b) Click **Reserve Number**. The Sub Status field becomes *Port Available*.

c) Click **Accessory Check**. The Sub Status field changes to *Accessories Check Done*.

d) Change the Customer Requested Date to the date requested by the customer. It cannot be less than the current date.

e) Click **Validate**. An alert, *All Validations are successful*, appears.

Note: The Sub Status field changes to *Validation Successful*.

User: AOTR

f) Login as AOTR. The AOTR Home View appears.

g) Under Activities, click the activity which has to be approved for shift. The Orders – Activities View of the Parent (disconnect) order appears.

Note:

i. The **Type** for shift will be *Shift Approval*.
ii. If you click the **Reject** button, the Status of the activity is *Rejected* and both the Reconnect and Disconnect orders has the Status as *Cancelled*, indicating that neither service for the old address has been disconnected nor the connection for the new address connection is done.
iii. If you click the Approve button, the Status of the activity becomes *Approved.*

User: CSRHYD

h) Login as CSRHYD. The CSRHYD Home View appears.

Note: After AOTR approves, the activity has to be closed by CSRHYD.

i) Under **Activities,** click the activity which has to be closed. The Orders – Activities View of the Parent (disconnect) order appears. The **Close** button is enabled.

j) Click **Close**. The activity Status will be *Closed*.

k) Click Child Orders view tab. The Orders – Child Orders View appears.

Note: In the lower applet, the child (or reconnect) order is seen.

l) Click **Order Number**. The Orders Detail View of the Child (or reconnect) order appears.

m) Click **Submit Order**. The order is submitted to the downstream systems.

Note: The Status field displays *Submission In Progress* and the Sub Status field displays, *Validation Successful*. The Status field value becomes *In Progress* and *Completed* thereafter indicating that both the child and the parent orders are completed. Once the order is completed, the view becomes completely non-editable. .

n) Click **Milestones** view tab. The Orders – Milestones View appears.

Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet displays *Completed* indicating that the order has been completed.

ii ***If the Nature of Shift is Shift When Feasible:***

a) Click **Available Numbers**. A list of numbers appears.

Note:

b) If the exchange happens without the number change, the list of new numbers does not appear. An alert that the existing number can continue to be in use appears. Click the Reserve Number button.

c) If the existing number in the old address cannot be used for the new address, then the list of new numbers appears, indicating that the old number cannot continue to be present at the new address.

d) Click **Reserve Number**. The Sub Status field becomes Port Available.

e) Click **Accessory Check**. The Sub Status field changes to *Accessories Check Done*.

f) Click **Validate**. An alert, *All the Validations are successful,* appears.

Note: The Sub Status field changes to *Validation Successful*.

User: AOTR

p) Login as AOTR. The AOTR Home View appears.

q) Under Activities, click the activity which has to be approved for shift. The Orders – Activities View of the Parent (disconnect) order appears.

Note: The **Type** for shift will be *Shift Approval*.

r) If you click the **Reject** button, the Status of the activity is *Rejected* and both the Reconnect and Disconnect orders has the Status as *Cancelled*, indicating that neither service for the old address has been disconnected nor the connection for the new address connection is done.

s) If you click the Approve button, the Status of the activity becomes *Approved.*

User: CSRHYD

t) Login as CSRHYD. The CSRHYD Home View appears.

Note: After AOTR approves, the activity has to be closed by CSRHYD.

u) Under **Activities,** click the activity which has to be closed. The Orders – Activities View of the Parent (disconnect) order appears. The **Close** button is enabled.

v) Click **Close**. The activity Status will be *Closed*.

w) Click Child Orders view tab. The Orders – Child Orders View appears.

Note: In the lower applet, the child (or reconnect) order can be seen.

x) Click **Order Number**. The detail view of the child (or reconnect) order appears.

y) .Click **Submit Order**. The order is submitted to the downstream systems.

Note: The Status field displays *Submission In Progress* and the Sub Status field displays *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter indicating that the child and the parent orders are completed. Once the order is completed, the view becomes completely non-editable.

z) Click **Milestones** view tab. The Orders – Milestones View appears.

Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this View displays *Completed*, the Status field in the upper applet also displays *Completed* indicating that the order has been completed.

iii ***If the Nature of Shit is Shift Immediate:***

Note:

i. The user can complete the disconnect order (parent order) before the child order as the Submit Order button and the Available Numbers button are both active.

ii. Change the installation address, failing which an alert is generated that the installation address needs to be changed.

a) Click **Available Numbers**. A list of numbers appears.

Note:

b) If the exchange happens without the number change, the list of new numbers does not appear. An alert that the existing number can continue to be in use appears. Click the Reserve Number button.

c) If the existing number in the old address cannot be used for the new address, then the list of new numbers appears, indicating that the old number cannot continue to be present at the new address.

d) Click Reserve **Number**. The Sub Status field becomes *Port Available*.

e) Select a number from the list. The selected number is populated in Service Id (Ph #) field.

f) Click **Accessory Check**. The Sub Status field changes to Accessories Check Done.

g) Click **Validate**. An alert, *Validations are successful*, appears.

Note: The Sub Status field changes to *Validation Successful*.

User: AOTR

h) Login as AOTR. The AOTR Home View appears.

i) Under Activities, click the activity which has to be approved for shift. The Orders – Activities View of the Parent (disconnect) order appears.

Note: The **Type** for shift will be *Shift Approval*.

j) If you click the **Reject** button, the Status of the activity is *Rejected* and both the Reconnect and Disconnect orders has the *Status* as *Cancelled*, indicating that neither service for the old address has been disconnected nor the connection for the new address connection is done.

k) If you click the Approve button, the Status of the activity becomes *Approved.*

User: CSRHYD

a) Login as CSRHYD. The CSRHYD Home View appears.

Note: After AOTR approves, the activity has to be closed by CSRHYD.

b) Under Activities**,** click the activity which has to be closed. The Orders – Activities View of the Parent (disconnect) order appears. The **Close** button is enabled.

c) Click **Close**. The activity Status will be *Closed*.

d) Click **Child Orders** view tab. The Orders – Child Orders View appears.

Note: In the lower applet, the child (or reconnect) order can be seen.

e) Click **Order Number**. The Orders Detail View of the child (or reconnect) order appears.

f) Click **Submit Order**. The order is submitted to the downstream systems. The Status field displays *Submission In Progress* and the Sub Status field displays, *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter indicating the completion of the parent and child order. Once the order is completed, the view becomes completely read only for the user.

g) Click **Milestones** view tab. The Orders – Milestones View appears.

Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet also displays *Completed* indicating that the order has been completed.

1.20 Shift of Landline Across Zones

In this scenario, the customer's service is disconnected in one zone and a new service is provided in the other zone. Each zone has a separate CRM application. For example, South Zone CRM, North Zone CRM, East Zone CRM and West Zone CRM.

The only way to identify the customer who has shifted from one zone to the other is by the **Transfer Flag** check box in **Orders** screen.

Prerequisites to proceed: Customer should have a permanent landline provisioned in the previous zone which had the old address.

To view if the customer had an account previously with BSNL in another zone:

1. Click **Orders** screen. The Orders Home View appears.
2. Enter any or all the values in the Search Criteria to view if the account was transferred from another zone. The Orders List View appears for that particular account. It can have one or more records.
3. Click **Order Number**. The Orders Detail View appears. In the upper applet, if the **Transfer Flag** check box is selected, it indicates that the account is a transferred account.

   i.

1.21 Landline Transfer – Third Party Transfer without Installation Address change

In this scenario, a customer can transfer the service from his account to another customer account without changing the installation address.

Prerequisites to proceed: For any transfer process, it is required that the customer to whom the service is being transferred should have an existing account with BSNL.

Users: CSR, AOTR

To transfer a landline facility from one customer to another customer, without changing the installation address:

User: **CSR**

1. Click Customer **Accounts** screen. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search Criteria.
3. Click **Go**. The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type field as *Third Party without inst addr*.
5. Click **Transfer**. Two orders are created and an activity is created under the parent order which can be viewed in the Activity view tab of the parent (disconnect) order.
   i. First, an order with Order Type as *Transfer* and Order Sub Type as *Third Party without inst addr* (Child order or Reconnection order) is created.
   ii. Second, an order with Order Type as *Transfer* and Order Sub Type as *Disconnect* (Parent order or Shift-Disconnect order) is created.
   Note: The Orders Detail View of the child order appears. The Accessory Check button is active.
6. Change the Account Name, Billing Account and Installation Address fields.

   Note: The new installation address has to be same as the installation address of the previous customer, as this transfer does not involve change in installation address.
7. Click **Accessory Check**. The Sub Status field changes from *Pending* to *Accessory Check Done*.
8. Change the Nominee Relation and the Nominee Name field under Orders – Line Items view tab.
9. Click **Validate** to check whether all mandatory changes have been made. The Sub Status field value changes to *Validation Successful*. If the validations are successful, a message, *Validations are successful,* appears.

User: AOTR

1. Login as AOTR. The AOTR Home View appears.
2. Click *Transfer Approval* link under **Activities**. The Orders – Activities View of the Parent (disconnect order) appears.
3. Click **Approve** or **Reject**. If the activity is approved, the Status of the activity becomes *Approved*. If the activity is rejected, the Status of the activity becomes *Rejected* and both, the child (reconnect) and the parent (disconnect) orders are cancelled.

User: CSR

4. Go to the Activity view tab of the parent (disconnect) order.
5. Click **Close**. The Status of the activity becomes *Closed*.
6. Click Child Orders view tab. The Orders – Child Orders View appears.
   Note: The child order record appears in the lower applet.
7. Click **Order Number**. The Orders Detail View of the child order appears.
8. Click **Demand Note**. A Demand Note for the requested facility is generated.
   Note: The Orders – Demand Note View appears. A record with the Demand Note Number and Amount, if any, to be paid by the customer appears. The Demand Note button becomes inactive.
9. Click **Make Payment**. The payment is made in PMS.
   Note: Once the payment is made, the Receipt Number field in the upper applet is auto-populated. The Submit Order button is activated.
10. Click **Submit Order**. The order is submitted to the downstream systems.
    Note: The Status field displays *Submission in Progress* and the Sub Status field displays *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter indicating

that both the child and parent orders are completed. Once the order is completed, the view becomes completely non-editable.

11. Click **Milestones** view tab. The Orders – Milestones View appears.

    Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet also *Completed* indicating that the order has been completed.
    Assumption: The service has been transferred from Account X to Account Y

    Click Customer Accounts screen. The Customer Accounts Home View appears.

12. Enter the Account Name **X.**
13. Click **Go**. The Customer Accounts – Account Summary View of the **X** account appears.

    Note: Under the Installed Services, the transferred services no longer exist.
14. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
15. Enter the Account Name **Y**.
16. Click **Go**. The Customer Accounts – Account Summary View of the **Y** account appears.
17. Under the Installed Services, the new service that has been transferred appears. This is the service which has been transferred from another account.

1.22 Landline Transfer – Third Party Transfer with Installation Address change

In this scenario, the customer can transfer the existing Landline service to another customer. In this case, the installation addresses of both these customers are different.

Prerequisites to proceed: For any transfer process, it is required that the customer to whom the service is being transferred, should have an existing account with BSNL.

Users: CSR, AOTR

To transfer a landline service from one customer to another with different installation addresses:

1. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search Criteria.
3. Click **Go**. The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type field as *Third Party without inst addr.*
5. Click **Transfer**. Two orders are created and an activity is created under the parent order which can be viewed in the Activity view tab of the parent (disconnect) order.
    i. First, an order with Order Type as *Transfer* and Order Sub Type as *Third Party without inst addr* (Child order or Reconnection order) is created.
    ii. Second, an order with Order Type as Transfer and Order Sub Type as Di*sconnect* (Parent order or Shift-Disconnect order) is created.

    Note: The Orders Detail View of the child order appears. The Accessory Check button is active.
6. Change the Account Name, Billing Account and Installation Address fields.

    Note: The new Installation Address has to be different from the Installation Address of the previous customer.
7. Click **Accessory Check**. The Sub Status field changes from *Pending* to *Accessory Check Done*.
8. Change the Nominee Relation and Nominee Name fields under the Orders – Line Items View tab.
9. Click **Validate** to check whether all mandatory changes have been made. The Sub Status field changes to *Validation Successful*. If the validations are successful, a message, *Validations are successful,* appears.

User: AOTR

10. Login as AOTR. The AOTR Home View appears.
11. Click **Transfer Approval** link under **Activities**. The Orders – Activities View of the Parent (disconnect) order appears.

12. Click Approve or Reject.

    Note: If the activity is approved, the Status of the activity becomes *Approved*. If the activity is rejected, the Status of the activity becomes *Rejected* and both the child (reconnect) and the parent (disconnect) orders are cancelled.

User: CSR

13. Go to Orders – Activities View of the parent (disconnect) order.
14. Click **Close**. The Status of the activity becomes *Closed*.
15. Click **Child Orders** view tab. The Orders – Child Orders View appears.

    Note: The child order record appears in the lower applet.
16. Click **Order Number**. The Orders Detail View of the child order appears.
17. Click **Demand Note**. The Demand Note for the requested facility is generated. The Orders – Demand Note View appears.

    Note: A record with the Demand Note Number and the Amount, if any, to be paid by the customer appears. The Demand Note button becomes *Inactive*.
18. Click **Make Payment**. The payment is made in PMS.

    Note: Once the payment is made, the Receipt Number field in the upper applet is auto-populated. The Submit Order button is activated.
19. Click **Submit Order**. The order is submitted to the downstream systems.

    Note: The Status field displays *Submission in Progress* and the Sub Status field displays, *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter indicating that the order is completed for both the child and parent orders. Once the order is completed, the view becomes completely non-editable.
20. Click **Milestones** view tab. The Orders – Milestones View appears.

    Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet also *Completed* indicating that the order has been completed.
    Assumption: The service has been transferred from Account X to Account Y.

    Click **Customer Accounts** screen. The Customer Accounts Home View appears.

21. Enter the Account Name as **X** in the Search Criteria.
22. Click **Go**. The Customer Accounts – Account Summary View of the **X** account appears.

    Note: Under the Installed Services, the transferred services no longer exist.
23. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
24. Enter the Account Name **Y**.
25. Click **Go**. The Customer Accounts – Account Summary View of the **Y** account appears.

    Note: Under the Installed Services, the new service that has been transferred appears. This is the service which has been transferred from another account.

1.23 Cancel Order

In this scenario, a user can voluntarily cancel an order for various reasons. For example, if the customer changes mind and does not want the service or the data is entered incorrectly and so on. An order cannot be cancelled after the INDOOR process is completed in the Milestones View tab.

Prerequisites to proceed: MDF should not be completed in the Milestones view of the order.

Assumption: CSR is either has the Status of the order as Open or has the Order Number which has to be cancelled.

Users: CSR

To cancel an order:

26. Click **Orders** screen. The Orders Home View appears.
27. Enter the Order Number in the Search field.
28. Click **Go**. The Orders List View of that particular order appears.
29. Click **Order Number**. The Orders Detail view appears.
30. Click **More Info** view tab. The Orders – More Info View with the additional details of the current order appears.
31. Select Cancellation Reason as *Voluntary Cancellation*. .
32. Click **Menu** (located in the upper applet). A list of options appears.

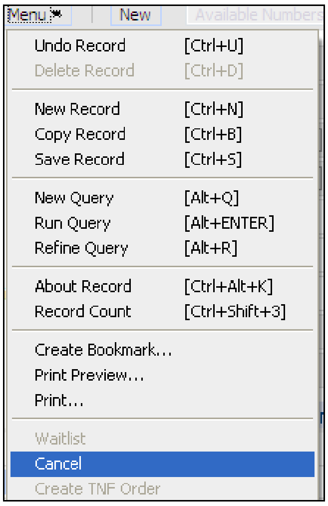

Figure 1 : Options under Menu button

33. Select **Cancel**. The Status field changes to *Cancellation in Progress* and then to *Cancelled* (if the Status was earlier *In Progress)* eventually indicating that the order has been cancelled. If the Status of the order was other than In Progress, the Status now changes to *Cancelled* after the Cancel option is selected.

    Note: For orders with Order Type as *Shift* and *Transfer*, the parent order cannot be cancelled; but when the child order is cancelled in the way mentioned above, both the orders (parent as well as child orders) are cancelled, that is the Status field for the orders becomes *Cancelled*.

1.24 Change in Bill Plan - Land Line

In this scenario, the customer can change the existing bill plan. As the bill plan changes, the pricing of the service also changes accordingly.

Prerequisites to proceed: The customer should have an existing landline connection.

User: CSR

To change the bill plan of a customer:

1. Follow Step 1 to Step 6 of Facility Provisioning for Landline.
2. Click **Plans** (This tab is selected by default). Change the plan by selecting a plan requested by the customer.
3. Click **Done**. The Orders Detail View appears.
4. Click **Accessory Check**. The Sub Status field changes from *Pending* to *Accessory Check Done*.
5. Click **Validate** to check whether all mandatory changes have been made. The Sub Status field value changes to *Validation Successful.* If the validations are successful, a message, *Validations are Successful,* appears.

6. Click **Demand Note**. A Demand Note for the requested plan is generated.

   Note: The Orders – Demand Note View appears with a record with the Demand Note Number and the Amount, if any, to be paid by the customer.

7. Click **Submit Order**. The order is submitted to the downstream systems.

   Note: The Status field displays *Submission in Progress* and the Sub Status field displays *Validation Successful*. The Status field becomes *In Progress* and *Completed* thereafter indicating that the order is completed after which the service is restarted for the customer. Once the order is completed, the view becomes completely non-editable.

8. Click **Milestones** view tab. The Orders – Milestones View appears.

   Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet displays *Completed* indicating that the order has been completed.

9. Copy (**Ctrl + C**) the phone number of the customer from the Service Id (Ph #) field.
10. Click **Services** screen. The Services Home View appears.
11. Click **Services List** link. The Services List View appears.
12. Paste (**Ctrl + V**) the copied phone number in the Service Id (Ph #) field. A record with this phone number with Status field value as *Active* appears.
13. Click the corresponding Service # field. The Service – Components View appears. In the lower applet, under the Product field, the new bill plan can be seen.

1.25FLPP Disconnection

In this scenario, the disconnection of the FLPP service is requested by the customer. Although the customer chooses to close the connection voluntarily, CSRRTN intervenes to check if the connection can be kept active.

Prerequisites to proceed: The customer should have an existing FLPP connection.

Users: CSR, CSRRTN

To disconnect an FLPP connection:

1. Follow Steps from 1 to 14 of the Voluntary Disconnection of Landline(Permanent Disconnection of Landline).

1.26Customer Name Change

In this scenario, the customer can request for a change in their account name.

Prerequisites to proceed: The customer should have an existing landline connection.

Users: CSR, CO

To change the name of the customer:

User: CSR

2. Click **Service Requests** screen. The Service Requests Home View appears.
3. Click **SR List** link. The Service Requests List View appears.
4. Click **New**. A new record is created highlighted in yellow.

   Note: The fields: Request #, Status, Sub-Status, Customer Name, and Owner are auto-populated.

5. Enter the information in the mandatory fields: Account, Service Id, Request Type, Change Type, Change Sub Type and Description.
6. Click **Ctrl+S** or go to Menu and click Save Record. The record is saved.
7. Enter First Name and Last Name fields which are mandatory. They are present under the Updated Details section in the lower applet.
8. Click **Submit**. The Sub-Status field changes to *Assigned to CO*. An alert is created for the CO in the CO home page.

User: CO

9. Login as CO. The CO Home View appears.
10. Click **Alert#** under My Alerts. The SR List View for that particular Service Request appears.
11. Click **Reject**. The Service Request is Rejected. The Status field becomes *Closed* and the Sub-Status field becomes *Rejected*.
12. Click **Approve**. The Service Request is Approved. The Status field and the Sub-Status field options are given below:
    - If Sub Status is *Approval in Progress,* Status becomes *Open*
    - If Sub Status is *Pending, Status* becomes *Open*
    - If Sub Status is *Resolved,* Status becomes *Closed*
    - If Sub Status is *Approval Failed,* Status becomes *Closed*
13. If the Service Request is approved, the changes in the customer Name are updated in the Contacts and Customer Accounts View of the customer in the CRM and also in the Billing system.

    Note: For any given account, if a Service Request is raised, another Service Request similar to the previous one cannot be raised. If raised, an alert indicating that a similar request has already been raised appears.

To view the changes made:

14. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
15. Enter the Account Name in the Search field.
16. Click **Go**. The Customer Accounts – Account Summary View appears.
17. Click **Contacts** View tab. The Customer Accounts – Contacts View appears. The new Name of the customer appears here.

1.27Change in Billing Address

In this scenario, the customer can request for a change in the Billing Address.

Prerequisites to proceed: The customer should have an exisitng landline connection.

Users: CSR, AOTR

To change the billing address of the customer:

User: CSR

1. Click **Service Requests** screen. The Service Requests Home appears.
2. Click **SR List** link. The Service Requests List View appears.
3. Click **New**. A new record is created highlighted in yellow.

    Note: Request #, Status, Sub-Status, Customer Name, and Owner fields are auto-populated.

4. Enter the information in the mandatory fields: Account, Service Id, Request Type, Change Type, Change Sub Type, and Description.

5. Click **Ctrl + S** or go to Menu and click **Save Record**. The record is saved.
6. Enter the information in the mandatory fields in the Updated Details (in the lower applet): House No/Flat No, Village Name/Colony Name, City/Mandal, State, District, PIN

   Note:The Address Type field is auto-populated as *Billing Address* and Country is auto-populated as *India*.

7. Click **Submit**. The Sub-Status field changes to *Assigned to CO*.

   Note: An alert is created for the AOTR in the AOTR home page.

User: AOTR

8. Login into CRM application as AOTR. The AOTR Home View appears.
9. Click **Alert#** under My Alerts. The SR List View for that particular Service Request appears.
10. Click **Reject**. The Service Request is rejected. The Status field becomes *Closed* and the Sub-Status field becomes *Rejected*.
11. Click **Approve**. The Service Request is approved. The Status field and the Sub-Status field options are given below:
    - If Sub Status is *Approval in Progress*, Status becomes *Open*
    - If Sub Status is *Pending*, Status becomes *Open*
    - If Sub Status is *Resolved*, Status becomes *Closed*
    - If Sub Status is *Approval Failed*, Status becomes *Closed*
12. If the service request is approved, the changes in the Billing Address are updated in the Customer Accounts of the customer in CRM and the Billing system also.

    Note: For any given account, if a Service Request is raised, another Service Request similar to the previous one cannot be raised. If raised, an alert indicating that a similar request has already been raised appears.

To check the changed billing address:

13. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
14. Enter the Account Name in the Search field.
15. Click **Go**. The Customer Accounts – Account Summary View appears.
16. Click Addresses view tab. The Customer Accounts – Addresses View appears.

    Note: The Billing Address along with the added details appears.

1.28Permanent Closure due to Expiry of Date (Casual)

Permanent Closure of a Landline connection due to Expiry of Date is applicable only for a Casual connection. In this scenario, the Service End Date value should be within 30 days from the date of connection. If the customer does not request for the extension of service, the service will be ended. T

A job is run everyday to check for any connections whose Service End Date has expired. If there are any such services, a Disconnection Order is created and the job is submitted. CSR or any other user cannot change any values manually in this scenario.

1.29Reconnection after Disconnection due to Misuse

In this scenario,

An alert is sent to CSR from the Fraud Management System (FMS) informing that the service can be reconnected.

Prerequisites to proceed: The outgoing facility should be barred for the customer on whose account reconnection is being done.

Users: CSR

To reconnect after disconnection due to misuse:

1. Login into the CRM application as CSR. The CSR Home View appears.

   Note: An alert with the Message Body, FMS Alert- Create the Modify order for <service id> and delete the Product *OUT GOING CALL BARRING*, appears.

2. Click **Task #.** The Customer Accounts – Accounts Summary View of the corresponding account appears.
3. Follow Step 3 to Step 7 in the Facility Provisioning for Landline.
4. Deselect the facility, *Out Going Call Barring*.
5. Click **Done**. The Orders Detail View appears. The details of the current order being created appear.
6. Follow Step 10 to Step 18 in the Facility Provisioning for Landline.

   Note: The *INCOMING CALL BARRING* facility can also be deselected the same way as given above.

1.30Category Change Process – Landline

In this scenario, a free phone connection can be convered to a normal phone or vice-versa.

Prerequisites to proceed: The Service Category field for the existing landline service should indicate *Free.*

Users: CSR

To change the category for a service:

1. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search fields.
3. Click **Go.** The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type field as *Free to Normal.*
5. Click **Modify**. An order with Order Type as *Modify* is created. The product configuration screen appears.
6. Click **Done**. The Orders Detail View appears. The details of the current order being created appear.

   Note: The Service Category field is editable.

7. Select Service Category as either *OYT-GEN* or *NONOYT-GEN* values.

   Note: If FREE is selected, an error, *Service Category is Invalid*, appears.

8. Delete (nullify) the Main Phone Number field under the Orders – Line Items.

   Note: When you click the Validate button, if the Phone number is not deleted, an alert appears.

9. Follow Step 10 to Step 18 in the Facility Provisioning for Landline.

1.31Change in Number- Land Line

In this scenario, the Service ID (phone number) provided by BSNL can be changed as per the customer's choice.

Prerequisites to proceed: The customer should have an existing permanent landline service.

Users: CSR

To change the existing phone number:

1. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search fields.
3. Click **Go.** The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type field as *Indicator Change*.
5. Click **Modify**. An order with Order Type as *Modify* is created. The product configuration screen appears.
6. Click **Done**. The Orders Detail View appears. The details of the current order being created appear.
7. **Note:** Available Numbers button is active.
8. Click **Available** Numbers. A list of numbers available for that particular exchange appears. Select a number from the list.
9. Click **OK**. The selected number is populated in Service Id (Ph #) field in the upper applet.
10. Click **Reserve Number**. The number selected is reserved.
11. **Note:** The Sub Status field changes from *Number Available* to *Port Available*.
12. Follow Step 10 to Step 18 in the Facility Provisioning for Landline.

1.32Conversion of Fixed Landline to Prepaid FLPP

The customer pays BSNL periodically after using the service provided. In this scenario, if the customer prefers to pay a certain amount before the service usage period, Prepaid FLPP facility can be provisioned to the customer.

Prerequisites to proceed: The customer should have an existing fixed landline connection.

Users: CSR

To convert a fixed landline to a Prepaid service:

13. Click Customer Accounts screen. The Customer Accounts Home View appears.
14. Enter any or all of the values in the Search fields. Click Go. The Customer Accounts - Account Summary View appears.
15. Select Order Sub Type field as Fixed to FLPP.
16. Click Modify. An order with Order Type as Modify is created. The product configuration screen appears.
17. Click Done. The Orders Detail View appears. The details of the current order being created appear.
18. Note: The Available Numbers and Accessory Check button are active. The Service Sub Type field is editable.
19. Select the Service Sub Type field as FLPP.
20. Follow Step 10 to Step 18 in the Facility Provisioning for Landline.

1.33Conversion of Prepaid to Fixed Landline

In this scenario, the customer has the provision to convert an existing FLPP service to a regular service.

Prerequisites to proceed: The customer should have an existing prepaid connection provisioned.

Users: CSR

To convert from Prepaid to Fixed Landline service:

1. Click Customer Accounts screen. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search fields. Click Go. The Customer Accounts - Account Summary View appears.
3. Select Order Sub Type field as FLPP to Fixed.
4. Click Modify. An order with Order Type as Modify is created. The product configuration screen appears.
5. Click Done. The Orders Detail View appears. The details of the current order being created appear.
6. Note: The Available Numbers and Accessory Check button are active. The Service Sub Type field is editable.
7. Select the Service Sub Type field as Fixed Landline.
8. Follow Step 10 to Step 18 in the **Facility Provisioning for Landline**

2 Business Scenarios - WLL

2.1 New WLL Fixed

WLL is wireless local loop which is a term used for a wireless communications link.

Prerequisites to proceed: The CSR should have a CAF details from the customer for whom the WLL is being provisioned.

Users: CSR

To provide a new WLL service for a customer:

9. Click the Customer Accounts screen. The Customer Accounts Home View appears.
10. Click Customer Accounts List link. The Customer Accounts List View appears.
11. Click New. A blank record is created and is highlighted in yellow.
12. Note: Customer Id field is auto-populated. The default value for Status is Prospect.
13. Enter the information in the mandatory fields: Account Name (Surname, Name) and Account Type.
14. Note: To refresh or delete the record you just entered, press Esc button.
15. Click Account Name. The Customer Accounts – Accounts Summary View appears.
16. To create a new WLL connection, the customer has to provide the details in the following tabs:
    a. Addresses
    b. Contacts
    c. Billing Accounts
17. Click Addresses view tab. The Customer Accounts – Addresses View appears.
    Note: No records are present as the addresses are yet to be added.
18. Click New. A blank record is created and is highlighted in yellow.

    Note: The Billing Address, Billing Correspondence Address and Installation Address are mandatory.
19. Click Contacts view tab. The Customer Accounts – Contacts View appears.
    Note: No records are present as the contacts have to be added.
20. Click New. A blank record is created and is highlighted in yellow.
21. Enter the information in all the mandatory fields: Surname, Name, Preferred Communication Method, and Preferred Communication Language.
22. Click the down arrow located next to Account Summary view tab on the right side of the screen in the lower applet. From the menu, select Billing Accounts. The Customer Accounts – Billing Accounts View appears.
23. Click New. A record appears.
24. Note: The fields Billing Account, Billing Account Number, Preferred Payment Method, Bill Media, Currency, Rural/Urban Status fields are auto-populated.
25. Provide the information in the mandatory fields: Contact Last Name, Contact First Name, Billing Account Type, Billing Account Sub Type, Frequency, Preferred Language Name, Bill Period, Billing Address, and Billing Corresponding Address.
26. Click Ctrl + S or click Menu and select Save Record option. The record is saved.
27. Click Orders. The Orders Home View appears.
28. Click Orders List link. The Orders List View appears.
29. Click the down arrow. A list appears.

30. Select Orders. The Orders Detail View appears.
31. Click New. A record with the customer name appears.
32. Note: The fields Order #, Order Number, Order Type, Order Sub Type, Credentials Collected, Currency Code, Number Type, Sales Channel, Order Date, Customer Requested Date, Status and Sub Status are auto-populated.
33. Enter the information in the mandatory fields: Account Name, Billing Account field and Installation Address.
34. Note: Select the Service Line field as Basic Phone Service, Service as Wireless, Service Type as WLL, Service Sub Type as WLL Fixed, Connection Type and Usage Code.

    The conditions are given below:

    a. If it is a Permanent connection, the **End Date** field is disabled.

    b. If it is a Casual connection, the **End Date** field is enabled and is mandatory.

35. Click Order Number. The Orders – More Info View appears.
36. Click Line Items view tab. The Orders – Line Items View appears.
37. Click New. A record appears.
38. Note: Line # and Billing Account, Usage Code, Action Code, DQ Level Value, DQ Level, Suggested Name, Deposit Type, Refund Type and Quantity fields are auto-populated.
39. Enter Nominee Name, select Nominee Relation.
40. Click Ctrl + S. The record is saved.
41. Click Customize. The Plans tab is active by default.
42. Select a plan, facility, accessories from the respective tabs according to the requirements of the customer.
43. Click Done. The Orders Detail View appears.
44. Follow Step 5 to Step 7 in the Change in Number- Land Line scenario and Step 10 to 18 in the Facility Provisioning for Landline.

2.2 WLL-TNF Connection

In this scenario, whenever the landline fixed connection is not feasible, WLL-TNF connection is provided to the customer.

Users: CSR

To provide a WLL-TNF connection:

1. Follow Step 1 to Step 15 in the New WLL Fixed.
2. Enter the information in the mandatory fields: Account Name, Billing Account field and Installation Address.
3. Note: Select the Service Line field as Basic Phone Service, Service as Wireline, Service Type as Landline, Service Sub Type as Fixed Landline, Connection Type and Usage Code.
4. Follow Step 17 to Step 23 in the New WLL Fixed.

   Note: Before submitting the order, the Status of the order can become *Not Feasible* at 3 stages when you click the following buttons:

   - Available Numbers
   - Reserve Number
   - Accessory Check

   The Validate button is active.

5. Click Validate to check whether all mandatory changes have been made.

Note: The Sub Status field changes to Validation Successful. If the validations are successful, a message, Validations are successful, appears.

6. Click Demand Note. The Demand Note for the requested facility is generated.
7. Note: The Orders – Demand Note View appears. A record with the Demand Note Number and the Amount, if any, to be paid by the customer appears
8. Click Make Payment. Payment is made in PMS. The Receipt Number field is auto-populated in the upper applet.
9. Click Menu. A list appears.
10. Select Create TNF Order. The current order Status field becomes Cancelled. A parent order is created with Order Type field as New, Service field as Wireless, Service Type field as WLL and Service Sub Type field as WLL TNF.
11. Click Parent Orders view tab in the lower applet. The Orders – Parent Orders View appears. The parent order with the WLL TNF service is seen.
12. Click Order Number. The Parent Order appears in the Orders Detail View.
13. Follow Step 5 to Step 7 in the Change in Number- Land Line scenario and Step 10 to Step 18 in the Facility Provisioning for Landline.

2.3 WLL Facility Provisioning

User: CSR

In this scenario, the customer may request for additional facilities for an existing WLL connection.

To provision a new facility on an existing WLL connection, see **Facility Provisioning for Landline.**

2.4 WLL Fixed Disconnection or WLL Permanent Closure

User: CSR

To disconnect or permanently close the WLL Fixed connection, See Voluntary Closure of Landline.

2.5 WLL -TNF Facility Disconnection

User: CSR

To disconnect a WLL-TNF Facility, See Voluntary Closure of Landline.

2.6 WLL Shift Scenarios – Within same exchange and without number change

User: CSR

To shift a WLL connection – Within same exchange and without number change, See **Shift of Landline within the Exchange(without number change).**

2.7 WLL Shift Scenarios - Within same exchange and with number change

User: CSR

To shift a WLL connection – Within same exchange and with number change, See **Shift of Landline within the Exchange(with number change)**.

2.8 WLL Shift Scenarios - Across exchanges

User: CSR

To shift a WLL connection – Across exchanges, See **Shift of Landline Across Exchanges with number change(and** within zones).

3 Business Scenarios - PCO

3.1 PCO Closure

Users: CSR

See Voluntary Closure of Landline

3.2 PCO Shift Across Exchanges

Users: CSR

See **Shift of Landline Across Exchanges with number change(and** within zones)

3.3 PCO Shift within Exchange (without number change)

Users: CSR

See **Shift of Landline within the Exchange(without number change)**

3.4 PCO Shift within Exchange (with number change)

Users: CSR

See **Shift of Landline within the Exchange(with number change)**

3.5 PCO – Accessory Provisioning

Users: CSR

See Accessory Provisioning for Landline

3.6 New PCO Connection for Local, STD and ISD PCOs

A user can subscribe to a public telephone. This service is different from a regular landline service as this is used for a commercial purpose.

Prerequisites to proceed: The CSR should have the CAF details of the customer for whom the PCO connection has to be provisioned.

Users: CSR

To provide a customer with a new PCO connection, follow the procedure below:

1. Follow the steps from Step 1 to 11 in the New WLL Fixed.
2. Provide the information in the mandatory fields: Contact Last Name, Contact First Name, Preferred Language Name, Bill Period, Billing Address and Billing Corresponding Address.
3. Fill the fields with the following values: Billing Account Type as PT, Billing Account Sub Type – select value from the dropdown list, Frequency as Fort Nightly
4. Click Orders screen. The Orders Home View appears.
5. Click Orders List link. The Orders List View appears.

   OR

   Click and select **Orders**. The Orders Detail View appears.

6. Click New. A record with the customer name is displayed.
   Note: The fields Order #, Order Number, Order Type, Order Sub Type, Credentials Collected, Currency Code, Number Type, Sales Channel, Order Date, Customer Requested Date, Status and Sub Status are auto-populated.
7. Enter the information in the mandatory fields: Account Name, Billing Account field and Installation Address.
8. Select the Service Line field as Basic Phone Service, Service as Wireline, Service Type as LL PCO, Service Sub Type as either "Landline PCO" or "FLPP PCO" or "CCB", Connection Type and Usage Code.
9. Click Order Number. The Orders – More Info View appears.
10. Click the down arrow. A list appears.
11. Select Orders. The Orders Detail View appears.
12. Click New. A record with the customer name appears.
13. Note: The fields Order #, Order Number, Order Type, Order Sub Type, Credentials Collected, Currency Code, Number Type, Sales Channel, Order Date, Customer Requested Date, Status and Sub Status are auto-populated.
14. Enter the information in the mandatory fields: Account Name, Billing Account field and Installation Address.

    Note: Select the Service Line field as Basic Phone Service, Service as Wireless, Service Type as WLL, Service Sub Type as WLL Fixed, Connection Type and Usage Code.

    The conditions are given below:
    a. If it is a Permanent connection, the **End Date** field is disabled.
    b. If it is a Casual connection, the **End Date** field is enabled and is mandatory.
15. Click Order Number. The Orders – More Info View appears.
16. Click Line Items view tab. The Orders – Line Items View appears.
17. Click Modify. An order with Order Type as Modify is created. The product configuration screen appears.
18. Click Done. The Orders Detail View appears. The details of the current order being created appear.

    Note: Available Numbers button is active.

    i. Click **Available** Numbers. A list of numbers available for that particular exchange appears. Select a number from the list.
19. Follow Step 10 to Step 18 in the Facility Provisioning for Landline.

    Note:

    i. The product to be selected for PCO in Line Items is "Landline PT".

    CCB is Coin Collection Box

3.7 Disconnection due to Non Payment

In this scenario, the user cannot update anything in CRM manually. If PMS finds that the payment is not being done, Clarity system is updated and Clarity in turn updates CRM. The outgoing calls will be barred for the customer.

To check if disconnection has been done due to non-payment for a regular customer:

Users: Any

20. Click Services screen. The Services Home View appears.

21. Click Services List link. The Services List View appears.
22. Click Query (in the upper applet). A blank record highlighted in yellow appears.
23. Select Operating Status field as OG barred – NP.
24. Click Go. The result may or may not return records. If there is one or more records, that means customers of these services have outgoing calls barred.

To disconnect due to non-payment for a VIP customer:

Users: CSR/AOTR

CRM receives a list of VIP customers who have not made payments. CSR calls the customer and asks for a date on which the customer can make the payment.

User: CSR

25. Click Services screen. The Services Home View appears.
26. Click Services List link. The Services List View appears.
27. Click Collections link. The Promise to Pay Date field is populated with a date. If today's date is more than the date mentioned in the field, the CSR has to escalate this to AOTR.
28. Click Submit. If today's date is more than the date mentioned in the field, an alert is generated for the AOTR. The Promise to Pay Status value is Submitted.

User: AOTR

29. Click Task # The Message Body Please approve/reject collection request, appears. The Services – Collections View appears.
30. Click Approve if the outgoing has to be disconnected. The task is approved and the outgoing service is barred for the customer and Promise to Pay Status value is Approved.

OR

31. Click Reject if the outgoing service should not be disconnected. The task is rejected and the outgoing service is not barred for the customer and Promise to Pay Status value is Rejected.

3.8 Permanent Closure due to Non Payment

The CO receives an alert to disconnect services permanently due to non-payment.

Prerequisites to proceed: The outgoing calls have been barred for this customer initially and later even the incoming calls have been barred.

Users: CO/CSRRTN

To disconnect service for a customer permanently due to non-payment of bills, follow the procedure below:

1. The procedure is similar to the Voluntary Closure of Landline scenario. The only difference is that instead of CSR the CO will be initiating the process and CSR is not involved. Only the CSRRTN users are involved.
2. The alert has the Message Body: Raise Permanent Disconnect order on the Service: <Service Id (Ph #)>; Date of Processing: <date of processing>.

4 Business Scenarios - Centrex

Centrex is central office based communication service which integrates all your multi located Telephone lines (Existing and New) into a single highly functional communication group with more distinctive features without any additional exupiment (like EXABX) at your premises.

For creating a New Centrex Connection, an order has to be created. Once the order is created, the processing of the order is controlled by exchanging messages between the downstream systems, that is Clarity and the Billing System. Depending on the request received from CRM, the Clarity System controls the required configurations either manually or automatically and sends the feedback to CRM in the form of controlled messages. Once the order is provisioned, CRM System automatically creates an Asset against that particular order. In other words, an Asset is created for every provision order completed.

Prerequisites to proceed:

- User should login into the CRM application
- User should have prior knowledge about the New Centrex Connection
- User should be assigned the role of CSR in the profile

4.1 New Centrex Connection

User: CSR

To create new Centrex Connection, details of the customer should be entered in a specific order: Contacts ➔ Customer Accounts ➔ Billing Accounts ➔ Orders.

1. Click Customer Accounts. The Customer Accounts Home View appears.
2. Click Customer Accounts List link. The Customer Accounts List View appears.
3. Click New. A blank record is created and is highlighted in yellow.
   Note: Customer Id and Status with a value as Prospect is auto-populated.
4. Enter the mandatory fields: Account Name (Surname, First Name) and Account Type.

   Note:

   i. To refresh or delete the record you just entered, press **Esc** button.

   ii. Once the Account Name is entered, it is a hyperlink.
5. Click **Account Name**. The Customer Accounts - Account Summary View appears. Information should be provided in the following view tabs.
   - Addresses
   - Contacts
   - Billing Accounts
6. Click Addresses View tab. The Customer Accounts – Addresses View appears.
7. Click New. A blank record is created and is highlighted in yellow.
8. Provide information in all the mandatory fields: Billing Address, Billing Correspondence Address and Installation Address.
9. Click Contacts view tab located next to the Accounts Summary View tab. The Customer Accounts – Contacts View appears.
10. Click New. A blank record is created and is highlighted in yellow.

11. Provide information in all the mandatory fields: Surname, Name, Preferred Communication Method, and Preferred Communication Language.
12. Click the down arrow located next to the Accounts Summary View. A dropdown list appears. Select Billing Accounts.
13. Click New. A blank record is created and is highlighted in yellow.
14. Provide the information in the mandatory fields: Billing Account Type, Billing Account Sub Type, Frequency, Preferred Language Name, Bill Period, Billing Address, and Billing Corresponding Address. For more information on Billing Accounts field names and their description, See Field References for Billing Accounts List View.
15. Click Ctrl + S. The record is saved.
16. Click Orders screen. The Orders Home View appears.
17. Click Orders List link. The Orders List View appears.

    Or

    Click Orders View in the Customer Accounts screen. The Orders Detail View appears.
18. Click **New**. A record is created and is highlighted in yellow.

    Note: Order Number, Order Type and Order Sub Type and other fields are auto-populated.
19. Enter the information in all the mandatory fields: Billing Account, Installation Address, and Connection Type as Permanent, Usage Code and Service Category.
20. Select the Service Line as Basic Phone Service; Service as Wire line, Service Type as Landline, and Service Sub Type as Fixed Landline.
21. Click Centrex/ISDN Group Id. The Centrex Group Number Pick Applet appears.
22. Select Centrex Group Id. Depending on the Service Sub Type selected, Centrex Group List is filtered and displayed.
23. Click Order Number. The Orders – More Info View appears.
24. Click Line Items view tab. The Orders – Line Items View appears.
25. Click New. A new record is created.
26. Enter information in all the mandatory fields: Nominee Name, Nominee Relation and Product. Depending upon the Service Type selected, Product is filtered and displayed.
27. Click Line #. The details of the Products selected can be viewed.
28. Click Customize to select the Plan, Facilities, Accessories and the Schemes. The customer can customize the product according to the requirement.
29. lick Plans tab to select the Centrex plans. By default, none is selected. Only one option can be selected at a time
30. Click Calling Level tab to select the customer's choice for Local, STD and ISD. By default, Local is selected
31. Click Facilities tab to select the facilities
32. Click Accessories tab to select the requested accessories of the choices provided. By default, LL NON CLI PHONE is selected
33. Click Centrex Schemes, Deposit Schemes, Installation Schemes, Rental Schemes and CUG Plans to select the customer's choice. By default, none is selected. Only one option can be selected at a time
34. Click Done to accept all the information provided. The Orders – Line Items View along with the selected products appears.
35. Click Available Numbers. A list with all the available numbers for that particular exchange and service type appears.
36. Select a number from the list. Depending on the availability, the list is populated.
37. Click OK. The number is selected.
38. Click Reserve Number. The Centrex number is reserved.

39. Click Accessory Check. The feasibility of the accessories selected is verified.
40. Note: After the Accessory Check is successful, Validate button is enabled.
41. Click Validate.

Note: If any of the information is missing, an alert is displayed with an appropriate message. For example, if a plan is not selected, an alert, Please Select at least one plan, appears.

42. Click Orders List link. The Orders List View appears.
43. Click Validate. If the information provided is complete and correct, the order is validated successfully. A dialog box with the message: Validations are successful appears.

    Note: Demand Note button is enabled after the validations.

44. Click **Demand Note**. The Demand Note View appears.

    Note: If the Total Amount in the Orders screen is Rs. 0.00, then the Submit Order button is activated without any payments (Make Payment button is disabled in the Demand Note Tab).

45. Click **Make Payment**. Based on the amount generated, the customer may have to pay the deposit as well as the other charges.

    Note:

    i. Once the payment is made, a Receipt Number is auto-populated in CRM.

    ii. Submit Order button is enabled after the payment details are entered.

46. Click Submit Order. Upon successful submission of the order, a message, Order is submitted successfully, appears. The order is submitted to the downstream systems for further processing. After the process is completed, the response messages are received from the downstream systems.

Note: CRM Order Id is the Reference Number to search a particular record in the Clarity system for generating a Service Order Number (SO number).

47. Click Orders List link. The Orders List View appears.
48. Click Order Number. The Orders Detail View appears.
49. Click Milestones View tab. The Orders – Milestones View appears.

Note: The status updates from the downstream systems can be viewed. After completing the process in the Provisioning Application (Clarity), the order details are sent to the Billing system (Kenan). After the processing of the order is successful in Billing, a message is sent to the CRM system.

50. Check the status message from the Billing System in the Milestones View to confirm that the new Centrex connection has been created.
51. Copy (Ctrl + C) the phone number from the Service Id (Ph #).
52. Click Services screen. Search on Service Id (Ph #) copied above.
53. Click Query. The service record appears.
54. Click Service #. The Services Detail View appears.
55. Verify and confirm the details in the Services Detail View. By default, the Service Details – Components View appears. Check if the product components requested are provisioned as per the customer's requirement.

4.2 Facility Provisioning for Centrex

Prerequisites to proceed: The customer should have an existing Centrex connection.

Users: CSR

To provision a new facility for a Centrex connection:

1. Click **Customer Accounts**. The Customer Accounts Home View appears.

2. Enter any or all values in the Search field.
3. Click **Go**. The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type as *Change in Service.*
5. Click **Ctrl+S**. The record is saved.
6. Click **Modify**. An order with the Order Type as Modify is created. The Orders Detail View appears with all the details of the current order being created.
7. Click Customize to select the Plan, Facilities, Accessories and the Schemes. The customer can customize the product according to the requirement.
8. Click **Facilities**. The facilities corresponding to the current service appears. Select the facilities required.
9. Click **Done**. The Orders Detail View appears with all the details of the current order being created.

   Note: More than one facility can be selected.

10. Click **Accessory Check.** The feasibility of the new order is verified.

    Note: The Sub Status changes from Pending to Accessory Check Done.

11. Click **Validate.** The mandatory changes that have been made are verified.

    Note: If the validations are successful, the Sub Status changes to *Validation Successful*. A message, *Validations are Successful* appears.

12. Click **Demand Note**. The Orders – Demand Note View appears.

    Note:

    i. The Demand Note is generated for the requested facility.

    ii. A record with the Demand Note Number and the amount if any, to be paid by the customer appears

13. Click **Submit Order**. The order is submitted to the downstream systems.

    Note:

    i. Status is Submission In Progress and the Sub Status is Validation Successful.

    ii. After the order is completed after which the facility is provisioned to the customer, the Status becomes In Progress and Completed.

    iii. Once the order is completed, the view becomes non-editable.

14. Click **Milestones View**. The Orders – Milestones View appears.

    Note: The Type field in this view indicates the downstream systems in which the order is pending. Status provides the status of the order in that respective system. If the Status field in this view is completed, the Status field in the upper applet is Completed indicating that the order has been completed.

15. Copy (Ctrl + C) the phone number of the customer from Service Id (Ph #).
16. Click **Services** screen. The Services Home View appears.
17. Click **Services List** link. The Services List View appears.
18. Paste (Ctrl + V) the copied phone number in Service Id (Ph #). A record with that particular phone number and the Status as Active appears.
19. Click the corresponding Service #. The Components View appears. In the lower applet, under the Product field, the added facility that has been added appears.

4.3 Centrex Disconnection - with Landline Connection

Prerequisites to proceed: The customer should have an exisitng Centrex connection.

User: CSR/CSRRTN

To disconnect a Centrex Landline Connection:

1. Click **Customer Accounts** screen. The Customer Accounts Home View appears.
2. Enter the value in any or all of the fields in the Search fields.
3. Click **Go**. The Customer Accounts - Account Summary View appears.
4. Select Order Sub Type field value as *Disconnect*.
5. Click **Ctrl + S**. The record is saved.
6. Click **Disconnect**. The Orders Detail View appears. The details of the current order appear.

   Note:

   i. An Activity for the disconnect order is created.

   ii. An order with the Order Type as Disconnect is created.

   iii. Activity created is of Type Retention Approval.

   iv. An alert is sent to the CSRRTN in the Home Page of the Application screen.

User: CSRRTN

7. Login into CRM as CSRRTN. The CSRRTN Home View appears.
8. Click **Alert#**. The Orders - Activities View appears.

   Note: CSRRTN can either Approve/Reject an activity.

9. Click **Reject**. The status of an activity changes to Cancelled and Order Status changes to Cancelled.
10. Click **Approve**. The activity is approved.

    Note: If the Comments field is null, an alert, *Comments should not be null* appears. Enter the Comments field and click **Approve**. The status of an activity changes to *Approved* and Order status changes to *Submission In Progress*. The order is submitted to the downstream systems. The Status field value becomes *In Progress* and *Completed* thereafter indicating the completion of the order after which the Centrex Service will be disconnected for the customer. Once the order is completed, the view becomes completely non-editable.

11. Click **Milestones** View. The Orders – Milestones View appears.

    Note: The Type field in this view indicates the downstream systems with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view is *Completed*, the Status field in the upper applet is *Completed* indicating that the order has been completed.

12. Copy (**Ctrl + C**) the phone number of the customer from the Service Id (Ph #) field.
13. Click **Services** screen. The Services Home View appears.
14. Click **Services List** link. The Services List View appears.
15. Paste (**Ctrl + V**) the copied phone number in the Service Id (Ph #) field. A record with the phone number for which the Status is *Inactive* appears.
16. Click the corresponding Service #. The Components View appears. In the lower applet, under the Product field, all the Facilities, Plans, Schemes with Status as Inactive appears.

4.4 Centrex Disconnection - Without Landline (Only Centrex feature)

To disconnect Centrex Connection without disconnection of landline, the customer should have the Centrex Connection being disconnected.

User: CSR

To disconnect a Centrex Connection without disconnection of landline:

17. Click Customer Accounts screen. The Customer Home View appears.
18. Enter the value in any or all of the Search fields.
19. Click Go. The Customer Accounts – Account Summary View appears.
20. Select Order Sub Type as Remove From Centrex Group.
21. Click Save or Ctrl+S. The record is saved.
22. Click Order Number. The Orders – More Info View appears.
23. Click Customize to select the Plan, Facilities, Accessories and the Schemes. The customer can customize the product according to the requirement.
24. Click Plans tab to select the Centrex plans. By default, none is selected. Only one option can be selected at a time.
25. Click Calling Level tab to select the customer's choice for Local, STD and ISD. By default, Local is selected.
26. Click Facilities tab to select the facilities
27. Click Accessories tab to select the requested accessories of the choices provided. By default, LL NON CLI PHONE is selected.
28. Click Centrex Schemes, Deposit Schemes, Installation Schemes, Rental Schemes and CUG Plans to select the customer's choice. By default, none is selected. Only one option can be selected at a time
29. Click Done to accept all the information provided. The Orders – Line Item View with the selected products appears.
30. Click Accessory Check. The feasibility of the new order is verified.
31. Note: The Sub Status changes from Pending to Accessory Check Done.
32. Click Validate. The mandatory changes that have been made are verified.
33. Note: If the validations are successful, the Sub Status changes to Validation Successful. A dialog box with Validations are Successful appears.
34. Click Submit Order. The order is submitted to the downstream systems.
35. Note:
36. Status is Submission In Progress and the Sub Status is Validation Successful.
37. After the order is completed after which the Centrex Service is disconnected for the customer, the Status becomes Completed.
38. Once the order is completed, the view becomes non-editable.
39.
40. Click Milestones View. The Orders – Milestones View appears.

    Note: The Type field in this view indicates the downstream systems in which the order is pending. Status provides the status of the order in that respective system. For example, if the Status field in this view shows Completed, the Status field in the upper applet shows Completed indicating that the order has been completed.

41. Copy (Ctrl + C) the phone number of the customer from Service Id (Ph #).
42. Click Services screen. The Services Home View appears.
43. Click Services List link. The Services List View appears.
44. Paste (Ctrl + V) the copied phone number in Service Id (Ph #). A record having with that particular phone number with Status as Active with Centrex/Group Group Id null.
45. Click the corresponding Service #. The Services – Components View appears. In the lower applet, under the Product field, the added facility that has been added appears.

4.5 Centrex: FR0400 – Technical Faults

Refer to the Process: Create a Technical Fault

4.6 Centrex: FR0401 – Billing Complaints

Refer to the Process: Create a Technical Fault

5 Business Scenarios - Call Hunting Group

For creating a New Call Hunting Connection, an order has to be created. Once the order is created, the processing of the order is controlled by exchanging messages between the downstream systems, that is Clarity and the Billing System. Depending on the request received from CRM, the Clarity system controls the required configurations either manually or automatically and sends the feedback to CRM system in the form of controlled messages. Once the order is provisioned, CRM system automatically creates an Asset against that particular order. In other words, an Asset is created for every provision order completed.

Prerequisites to proceed:

- User should login into the CRM application
- User should have prior knowledge about the New Centrex Connection
- User should be assigned the role of CSR in the profile

5.1 New Landlines forming new Call Hunting Group

To create new Call Hunting Group with new Landline Connection, details of the customer should be entered in a specific order: Contacts ➔ Customer Accounts ➔ Billing Accounts ➔ Orders.

1. Click Customer Accounts screen. The Customer Accounts Home View appears.
2. Click Customer Accounts List link. The Customer Accounts List View appears.
3. Click New. A blank record is created and is highlighted in yellow.

   Note: Customer Id and Status with a value as Prospect is auto-populated.

4. Enter the mandatory fields: Account Name (Surname, First Name) and Account Type.

   Note:

   i. To refresh or delete the record you just entered, press Esc button.
   ii. Once the Account Name is entered, it is a hyperlink.
   iii. Click Account Name. The Customer Accounts - Account Summary View appears. Information should be provided in the following view tabs.

   - Addresses
   - Contacts
   - Billing Accounts

5. Click Addresses View tab. The Customer Accounts – Addresses View appears.
6. Click New. A blank record is created and is highlighted in yellow.
7. Provide information in all the mandatory fields: Billing Address, Billing Correspondence Address and Installation Address. For more information on how to provide the Addresses, See Creating New Address.
8. Click Contacts view tab located next to the Accounts Summary View tab. The Customer Accounts – Contacts View appears.
9. Click New. A blank record is created and is highlighted in yellow.
10. Provide information in all the mandatory fields: Surname, Name, Preferred Communication Method, and Preferred Communication Language.
11. Click the down arrow located next to the Accounts Summary View. A dropdown list appears. Select Billing Accounts.
12. Click New. A blank record is created and is highlighted in yellow.

Note: The Billing Account Number, Status and other fields are auto-populated.

13. Provide the information in the mandatory fields: Billing Account Type, Billing Account Sub Type, Frequency, Preferred Language Name, Bill Period, Billing Address, and Billing Corresponding Address.
14. Click Save or Ctrl + S to save the record.
15. Click Orders screen. The Orders Home View appears.
16. Click Orders List link. The Orders List View appears.

    Or

    Click Orders View in the Customer Accounts screen. The Orders Detail View appears.

17. Click **New**. A record is created and is highlighted in yellow.

    Note: Order Number, Order Type and Order Sub Type and other fields are auto-populated.

18. Enter the information in all the mandatory fields: Billing Account, Installation Address, and Connection Type as Permanent, Usage Code and Service Category.
19. Select the Service Line as Basic Phone Service; Service as Wire line, Service Type as Landline, and Service Sub Type as Fixed Landline.
20. Click Order Number. The Orders – More Info View appears.
21. Click Line Items View tab. The Orders – Line Items View appears.
22. Click New. A new record is created.
23. Provide information in all the mandatory fields: Nominee Name, Nominee Relation and Product.

    Note: Depending upon the Service Type selected, Product is filtered and displayed.

24. Click Line #. The details of the Products selected can be viewed.
25. Click Customize to select the Plan, Facilities, Accessories and the Schemes. The customer can customize the product according to the requirement.
26. Click Plans tab to select the Centrex plans. By default, none is selected. Only one option can be selected at a time
27. Click Calling Level tab to select the customer's choice for Local, STD and ISD. By default, Local is selected
28. Click Facilities tab to select the facilities
29. Click Accessories tab to select the requested accessories of the choices provided. By default, LL NON CLI PHONE is selected
30. Click Centrex Schemes, Deposit Schemes, Installation Schemes, Rental Schemes and CUG Plans to select the customer's choice. By default, none is selected. Only one option can be selected at a time
31. Click Done to accept all the information provided. The Orders – Line Items View with the selected products appears.
32. Click Available Numbers. A list with all the available numbers for that particular exchange and service type appears.
33. Select a number from the list. Depending on the availability, the list is populated.
34. Click OK. A number is selected.
35. Click Reserve Number. The Service Id (Ph #) number selected is reserved.
36. Click Accessory Check. The feasibility of the accessories selected is verified.

    Note: After the Accessory Check is successful, Validate button is enabled.

37. Click **Validate**. The mandatory changes made are verified.

Note: CH Pilot No (Reference #) value is updated with Service Id (Ph #) number. If any information is missing, an alert is displayed with an appropriate message. For example, if a plan is not selected, an alert, *Please Select at least one plan*, appears. Fill in the details.

38. Click Orders List link. The Orders List View appears.
39. Click Order Number. The Orders Detail View appears.
40. Click Validate. If the information provided is complete and correct, the order is validated successfully. A message, Validations are successful appears.
41. Click **Demand Note**. The Orders – Demand Note View appears.

    Note: If the Total Amount in the Orders screen is Rs. 0.00, then the Submit Order button is activated without any payments (Make Payment button is disabled in the Demand Note Tab).

42. Click Make Payment. The payment is made in PMS.
43. Note:
44. Based on the amount generated, the customer has to pay the deposit as well as the other charges.
45. Once the payment is made, a Receipt Number is auto-populated in CRM. Submit Order button is enabled after the payment details are entered
46. Click Submit Order**.** The order is submitted to the downstream systems.

    Note:

    i. Upon successful submission of the order, a message, *Order is submitted successfully*, appears. After the process is completed, the response messages are received from the downstream systems.
    ii. CRM Order Id is the Reference Number to search a particular record in the Clarity System for generating a Service Order Number (SO number).

47. Click Orders List link. The Orders List View appears.
48. Click Order Number. The Orders Detail View appears.
49. Click Milestones view tab. The Orders – Milestones View tab appears.

    Note: The status updates from the downstream systems can be viewed. After completing the process in the Provisioning Application (Clarity), the order details are sent to the Billing System (Kenan). After the processing of the order is successful in Billing, a message is sent to the CRM system.

50. Check the status message from the Billing System in the Milestones View to confirm that the new Call Hunting connection has been created.
51. Copy (Ctrl + C) the phone number from the Service Id (Ph #).
52. Click Services screen. The Services Home View appears.
53. Search on Service Id (Ph #) copied above.
54. Click Query. The service record appears.
55. Paste (Ctrl + V) the copied Service Id (Ph #).
56. Verify and confirm the details in the Services Detail View. By default, the Service Details – Components View appears. Check if the product components requested are provisioned as per the customer's requirement.

5.2 Existing Landlines forming new Call Hunting Group

Prerequisites to proceed: The landline connection should be existing

User: CSR

To add new Call Hunting Group to the Existing Landline: :

1. Click Customer Accounts. The Customer Accounts Home View appears.
2. Enter the value in any or all of the Search fields.
3. Click Go. The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type as Add to CH Group.
5. Click Save or Ctrl+S. The record is saved.
6. Click Modify. An order with the Order Type as Modify is created. The Orders Detail View appears with all the details of the current order being created.
7. Click Customize to select the Plan, Facilities, Accessories and the Schemes. The customer can customize the product according to the requirement.
8. Click Plans tab to select plans. By default, none is selected. Here only one option has to be selected.
9. Click Calling Level tab to select customer's choice for Local, STD and ISD. By default, Local is selected.
10. Click Facilities tab to select requested facilities.
11. Click Accessories tab to select requested accessories of the choices provided. By default, LL NON CLI PHONE is selected.
12. Click Deposit Schemes, Installation Schemes and Rental Schemes to select customer's choice. By default, none is selected. Here only one option needs to be selected.
13. Click Done to accept all the information provided. The Orders – Line Items View with the selected products appears.
14. Click Available Numbers. A list with all the available numbers for that particular exchange and service type appears.
15. Select a number from the list. Depending on the availability, the list is populated.
16. Click OK. The number is selected.
17. Click Reserve Number. The Service Id (Ph #) number is selected.
18. Click Accessory Check. The feasibility of the accessories selected is verified.

    Note: After the Accessory Check is successful, Validate button is enabled.

19. Click **Validate**. The mandatory details entered are verified.

    Note: If any information is missing, an alert is displayed with an appropriate message. For example, If HUNTING facility is not selected, an alert: *Please select HUNTING Facility*, appears. Fill in the relevant details.

20. Click Orders List link. The Orders List View appears.
21. Click Order Number. The Orders Detail View appears.
22. Click Validate. If the information provided is complete and correct, the order is validated successfully. A message, *Validations are successful* appears.

    Note: Demand Note button is enabled after the validations.

23. Click **Demand Note**. The Orders – Demand Note View appears.

    Note: If the Total Amount in the Orders screen is Rs. 0.00, then the Submit Order button is activated without any payments (Make Payment button is disabled in the Demand Note Tab).

24. Click **Make Payment**. Based on the amount generated, the customer has to pay the deposit as well as the other charges.

    Note: Once the payment is made, a Receipt Number is auto-populated in CRM. Submit Order button is enabled after the payment details are entered.

25. Click **Submit Order.** The order is submitted to the downstream systems.

    Note:

i. Upon successful submission of the order, a message, *Order is submitted* successfully, appears. After the process is completed, the response messages are received from the downstream systems.

ii. CRM Order Id is the Reference Number to search a particular record in the Clarity System for generating a Service Order Number (SO number).

iii.

26. Click Orders List link. The Orders List View appears.
27. Click Order Number. The Orders Detail View appears.
28. Click Milestones view tab. The Orders – Milestones View appears.

    Note: The status updates from the downstream systems can be viewed. After completing the process in the Provisioning Application (Clarity), the order details are sent to the Billing system (Kenan). After the processing of the order is successful in Billing, a message is sent to the CRM system.

29. Check the status message from the Billing System in the Milestones View to confirm that the adding Call Hunting Group to the existing landline connection.
30. Copy (Ctrl + C) the phone number from the Service Id (Ph #).
31. Click Services screen. Search on Service Id (Ph #) copied above.
32. Click Query. The service record appears.
33. Click Service #. The Services Detail View appears.
34. Verify and confirm the details in the Services Detail View. By default, the Services – Components View appears. Check if the product components requested are provisioned as per the customer's requirement.

5.3 New Landline forming existing Call Hunting Group

Prerequisites to proceed: The customer should have an existing Call Hunting Connection Group.

User: CSR

To create new Call Hunting Group child connection:

1. Click Customer Accounts. The Customer Accounts Home View appears.
2. Enter any or all the values in the Search fields.
3. Click Go. The Customer Accounts - Account Summary View appears.
4. Click Orders View tab. The Customer Accounts – Orders View appears.
5. Click New. A record is created and is highlighted in yellow.

   Note: Order Number, Order Type and Order Sub Type and other fields are auto-populated.

6. Enter the information in all the mandatory fields: Billing Account, Installation Address, and Connection Type as Permanent, Usage Code and Service Category.
7. Select the Service Line as Basic Phone Service; Service as Wire line, Service Type as Landline, and Service Sub Type as Fixed Landline.
8. Click Order Number. The Orders – More Info View appears.
9. Select CH Pilot No (Reference #) number. The CH Pilot Number Pick Applet appears.
10. Select CH Pilot No. Click OK.
11. Click Line Items view tab. The Orders – Line Items View appears.
12. Click New. A new line item is added.
13. Provide information in all the mandatory fields: Nominee Name, Nominee Relation and Product. Depending on the Service Type selected, Product is filtered and displayed.
14. Click **Line #.** The details of the Products selected can be viewed.

15. Click Customize to select the Plan, Facilities, Accessories and the Schemes. The customer can customize the product according to the requirement.
16. Click Plans tab to select the Centrex plans. By default, none is selected. Only one option can be selected at a time
17. Click Calling Level tab to select the customer's choice for Local, STD and ISD. By default, Local is selected
18. Click Facilities tab to select the facilities
19. Click Accessories tab to select the requested accessories of the choices provided. By default, LL NON CLI PHONE is selected
20. Click Centrex Schemes, Deposit Schemes, Installation Schemes, Rental Schemes and CUG Plans to select the customer's choice. By default, none is selected. Only one option can be selected at a time
21. Click Done to accept all the information provided. The Orders – Line Items View with the selected products appears.
22. Click Available Numbers. A list with all the available numbers for that particular Exchange and Service Type appears.
23. Select CH Pilot No (Reference #) number. The CH Pilot Number Pick Applet appears.
24. Select a number.
25. Click OK. The number is selected.
26. Click Reserve Number. The Number selected is reserved.
27. Click Accessory Check. The feasibility of the accessories selected is verified.
28. Note: After the Accessory Check is successful, Validate button is enabled.
29. Click Validate. The mandatory changes made are verified.
30. Note: If any of the information is missing, an alert is displayed with an appropriate message. For example, If Hunting facility is selected, an alert with the message: Please remove Hunting Facility, appears. Fill in the relevant details.
31. Click Orders List link. The Orders List View appears.
32. Click Order Number. The Orders Detail View appears.
33. Click Validate. If the information provided is complete and correct, the order is validated successfully. A message, Validations are successful appears.
34. Note: Demand Note button is enabled after the validations.
35. Click Demand Note. The Orders – Demand Note View appears.

    Note: If the Total Amount in the Orders screen is Rs. 0.00, then the Submit Order button is activated without any payments (Make Payment button is disabled in the Demand Note Tab).

36. Click Make Payment. Based on the amount generated, the customer has to pay the deposit as well as the other charges.

    Note: Once the payment is made, a Receipt Number is auto-populated in CRM. Submit Order button is enabled after the payment details are entered.

37. Click **Submit Order.** The order is submitted to the downstream systems.

    Note:

    i. Upon successful submission of the order, a message, *Order is submitted successfully*, appears. After the process is completed, the response messages are received from the downstream systems.
    ii. CRM Order Id is the Reference Number to search a particular record in the Clarity System for generating a Service Order Number (SO number)

38. Click Orders List link. The Orders List View appears.
39. Click Order Number. The Orders Detail View appears.
40. Click Milestones view tab. The Orders – Milestones View appears.

Note: The status updates from the downstream systems can be viewed. After completing the process in the Provisioning Application (Clarity), the order details are sent to the Billing System (Kenan). After the processing of the order is successful in Billing, a message is sent to the CRM system.

41. Check the status message from the Billing System in the Milestones View to confirm that the new child Call Hunting Group record with new landline connection is created.
42. Copy (Ctrl + C) the phone number from the Service Id (Ph #).
43. Click Services screen. The Services Home View appears.
44. Search on Service Id (Ph #) copied above.
45. Click Query. The service record appears.
46. Click Service #. The Services Detail View appears.
47. Verify and confirm the details in the Services Detail View. By default, the Service Details – Components View appears. Check if the product components requested are provisioned as per the customer's requirement.

5.4 Existing Landline attached to the existing Call Hunting Group

Prerequisites to proceed: The Call Hunting Group and landline connection should be existing

Users: CSR

To add existing Call Hunting Group to the Existing Landline:

1. Click Customer Accounts. The Customer Accounts Home View appears.
2. Enter any or all the values in the Search field.
3. Click Go. The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type as Add to CH Group.
5. Click Save or Ctrl+S. The record is saved.
6. Click Modify. An order with the Order Type as Modify is created. The Orders Detail View appears with all the details of the current order being created.
7. Click Customize to select the Plan, Facilities, Accessories and the Schemes. The customer can customize the product according to the requirement.
8. Click Plans tab to select the Centrex plans. By default, None is selected. Only one option can be selected at a time
9. Click Calling Level tab to select the customer's choice for Local, STD and ISD. By default, Local is selected
10. Click Facilities tab to select the facilities
11. Click Accessories tab to select the requested accessories of the choices provided. By default, LL NON CLI PHONE is selected
12. Click Centrex Schemes, Deposit Schemes, Installation Schemes, Rental Schemes and CUG Plans to select the customer's choice. By default, none is selected. Only one option can be selected at a time
13. Click Done to accept all the information provided. The Orders screen appears with the selected products under the Line Items tab.
14. Click Available Numbers. A list with all the available numbers for that particular exchange and service type are populated.

    Note: If any of the information is missing, an alert is displayed with an appropriate message. For example, if a CH Pilot No. is not selected, an alert, *Please Populate Pilot No,* appears

15. Select CH Pilot No (Reference #) number. The CH Pilot Number Pick Applet appears.
16. Select one of the numbers. Depending on the availability, the list is populated.

17. Click OK. The number is selected.
18. Click Reserve Number. The Service Id number is reserved.
19. Click Accessory Check. The feasibility of the accessories selected is verified.

    Note: After the Accessory Check is successful, Validate button is enabled.

20. Click **Validate**. The mandatory changes are validated.

    Note: If any information is missing, an alert is displayed with an appropriate message. For example, If Hunting facility is selected, an alert: *Please remove Hunting Facility,appears.* Fill in the relevant details.

21. Click Orders List link. The Orders List View appears.
22. Click Order Number. The Orders Detail View appears.
23. Click Validate. If the information provided is complete and correct, the order is validated successfully. A message, Validations are successful appears.

    Note: Demand Note button is enabled after the validations.

24. Click **Demand Note**. The Orders – Demand Note View appears.

    Note: If the Total Amount in the Orders screen is Rs. 0.00, then the Submit Order button is activated without any payments (Make Payment button is disabled in the Demand Note Tab).

25. Click **Make Payment**. The payment is made in PMS. Based on the amount generated, the customer has to pay the deposit as well as the other charges.

    Note: Once the payment is made, a Receipt Number is auto-populated in CRM. Submit Order button is enabled after the payment details are entered.

26. Click **Submit Order.** The order is submitted to the downstream systems.

    Note:

    i. Upon successful submission of the order, a message, *Order is submitted successfully*, appears. After the process is completed, the response messages are received from the downstream systems.
    ii. CRM Order Id is the Reference Number to search a particular record in the Clarity System for generating a Service Order Number (SO number).

27. Click Orders List link. The Orders List View appears.
28. Click Order Number. The Orders Detail View appears.
29. Click Milestones view tab. The Orders – Milestones View appears.

    Note: The status updates from the downstream systems can be viewed. After completing the process in the Provisioning Application (Clarity), the order details are sent to the Billing System (Kenan). After the processing of the order is successful in Billing, a message is sent to the CRM system.

30. Check the status message from the Billing System in the Milestones View to confirm the existing Call Hunting Group is attached to the existing Landline connection.
31. Copy (Ctrl + C) the phone number from the Service Id (Ph #).
32. Click Services screen. Search on Service Id (Ph #) copied above.
33. Click Query. The service record appears.
34. Click Service #. The Services Detail View appears. Verify and confirm the details in the Services Detail View.

5.5 Deleting a member from Call Hunting Group

Prerequisites to proceed: A child Call Hunting Group connection should exist

Users: CSR

To delete a member from Call Hunting Group:

1. Click Customer Accounts screen. The Customer Accounts Home View appears.
2. Enter any or all the values in the Search fields.
3. Click Go. The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type as Remove from CH Group.
5. Click Save or Ctrl+S. The record is saved.
6. Click Modify. An order with the Order Type as Modify is created. The Orders Detail View appears with all the details of the current order being created.
7. Click Customize to select the Plan, Facilities, Accessories and the Schemes. The customer can customize the product according to the requirement.
8. Click Plans tab to select the Centrex plans. By default, none is selected. Only one option can be selected at a time
9. Click Calling Level tab to select the customer's choice for Local, STD and ISD. By default, Local is selected
10. Click Facilities tab to select the facilities
11. Click Accessories tab to select the requested accessories of the choices provided. By default, LL NON CLI PHONE is selected
12. Click Centrex Schemes, Deposit Schemes, Installation Schemes, Rental Schemes and CUG Plans to select the customer's choice. By default, none is selected. Only one option can be selected at a time
13. Click Done to accept all the information provided. The Orders – Line Items view with the selected products appears.
14. Click Accessory Check. The feasibility of the new order is verified.

    Note: The Sub Status changes from Pending to Accessory Check Done.

15. Click Validate. The mandatory changes that have been made are verified.

    Note: If a CH Pilot No (Reference #) is not null, an message, Please Remove Pilot Number appears. Fill in the relevant details and navigate to the Orders Screen and click Validate.

    If the validations are successful, the Sub Status changes to Validation Successful. A dialog box with Validations are Successful appears

16. Click Submit Order. The order is submitted to the downstream systems.

    Note:

    Upon successful submission of the order, a message, Order is submitted successfully, appears. The order is submitted to the downstream systems for further processing. After the process is completed, the response messages are received from the downstream systems.

    CRM Order Id is the Reference Number to search a particular record in the Clarity System for generating a Service Order Number (SO number).

17. Click Orders List link. The Orders List View appears.
18. Click Order Number. The Orders Detail View appears.
19. Click Milestones view tab. The Orders – Milestones View appears.

    Note: The status updates from the downstream systems can be viewed. After completing the process in the Provisioning Application (Clarity), the order details are sent to the Billing System (Kenan). After the processing of the order is successful in Billing, a message is sent to the CRM system.

20. Check the status message from the Billing System in the Milestones View to confirm that the child record from the Call Hunting Group has been deleted.
21. Copy (Ctrl + C) the phone number from the Service Id (Ph #).
22. Click Services screen. The Services Home View appears.
23. Click Services List link. The Services List View appears.
24. Click Query. The service record appears.
25. Enter the Service Id (Ph #) copied above in the Search field.
26. Click Service #. The Services Detail View appears. Verify and confirm the details in the Services Detail View.

5.6 Deletion of entire Call Hunting Group

Users: CSR

To delete an entire Call Hunting Group, the customer should have an existing Call Hunting Group facility.

To delete an entire Call Hunting Group:

1. Click Customer Accounts screen. The Customer Accounts Home View appears.
2. Enter any or all the values in the Search fields.
3. Click Go. The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type as Remove from CH Group.
5. Click Save or Ctrl+S. The record is saved.
6. Click Modify. An order with the Order Type as Modify is created. The Orders Detail View appears with all the details of the current order being created.
7. Click Customize to select the Plan, Facilities, Accessories and the Schemes. The customer can customize the product according to the requirement.
8. Click Plans tab to select the Centrex plans. By default, none is selected. Only one option can be selected at a time.
9. Click Calling Level tab to select the customer's choice for Local, STD and ISD. By default, Local is selected.
10. Click Facilities tab to select the facilities.
11. Click Accessories tab to select the requested accessories of the choices provided. By default, LL NON CLI PHONE is selected.
12. Click Centrex Schemes, Deposit Schemes, Installation Schemes, Rental Schemes and CUG Plans to select the customer's choice. By default, none is selected. Only one option can be selected at a time.
13. Click Done to accept all the information provided. The Orders – Line Items View with the selected products appears.
14. Click Accessory Check. The feasibility of the accessories selected is verified.
15. Note: After the Accessory Check is successful, Validate button is enabled.
16. Click Validate. All the mandatory changes made are verified.

    Note:

    i. If any of the information is missing, an alert is displayed with an appropriate message. For example, if a plan is not selected, an alert, *Please Select at least one plan*, appears.

    ii. If a Pilot Number and 'HUNTING' Facility are not removed, an alert with the message: Pilot Number and 'HUNTING' Facility Should be removed, appears. Fill in the relevant details and navigate to the Orders Screen and click Validate.

17. Fill in the relevant details and navigate to the Orders Screen. Click Validate.

18. If the information provided is complete and correct, the order is validated successfully. A dialog box with the message: *Validations are successful* appears.
19. Click **Submit Order.** The order is submitted to the downstream systems.

    Note:

    i. Upon successful submission of the order, a message, *Order is submitted successfully*, appears. The order is submitted to the downstream systems for further processing. After the process is completed, the response messages are received from the downstream systems.
    ii. CRM Order Id is the Reference Number to search a particular record in the Clarity System for generating a Service Order Number (SO number).
20. Click Orders List link. The Orders List View appears.
21. Click Order Number. The Orders Detail View appears.
22. Click Milestones View. The Orders – Milestones View appears.

    Note: The status updates from the downstream systems can be viewed. After completing the process in the Provisioning Application (Clarity), the order details are sent to the Billing System (Kenan). After the processing of the order is successful in Billing, a message is sent to the CRM system.
23. Check the status message from the Billing System in the Milestones View to confirm the deletion of entire Call Hunting Group.
24. Copy (Ctrl + C) the phone number from the Service Id (Ph #).
25. Click Services screen. The Services Home View appears.
26. Enter the Service Id (Ph #) copied above.
27. Click Query. The service record appears.
28. Click Service #. The Services Detail View appears. Verify and confirm the details in the Services Detail View.

5.7 Change of pilot number in CH group

In this process, the customer account's service is disconnected completely from one Call Hunting Group and the customer account Landline connection is attached to the other Call Hunting Group.

To change pilot number in Call Hunting Group, the customer should have an existing Call Hunting Facility facility

In this scenario, two processes are involved.

i. To disconnect a member from Call Hunting Group:

See **Deleting a member from Call Hunting Group.**

ii. To Existing Landlines forming new Call Hunting Group:

See **Existing Landlines forming new Call Hunting Group**

5.8 Change of child number in Call Hunting Group

Prerequisites to proceed: The customer should have an existing child Call Hunting group connection

Users: CSR

To change child number in Call Hunting Group:

1. Click **Customer Accounts**. The Customer Accounts Home View appears.
2. Enter any or all the values in the Search fields.

3. Click Go. The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type as Indicator Change.
5. Click Save or Ctrl+S. The record is saved.
6. Click Modify. An order with the Order Type as Modify is created. The Orders Detail View appears with all the details of the current order being created.
7. Click Customize to select the Plan, Facilities, Accessories and the Schemes. The customer can customize the product according to the requirement.
8. Click Plans tab to select the Centrex plans. By default, none is selected. Only one option can be selected at a time.
9. Click Calling Level tab to select the customer's choice for Local, STD and ISD. By default, Local is selected.
10. Click Facilities tab to select the facilities.
11. Click Accessories tab to select the requested accessories of the choices provided. By default, LL NON CLI PHONE is selected.
12. Click Centrex Schemes, Deposit Schemes, Installation Schemes, Rental Schemes and CUG Plans to select the customer's choice. By default, none is selected. Only one option can be selected at a time.
13. Click Done to accept all the information provided. The Orders – Line Items View with the selected products appears.
14. Click Available Numbers. A list with all the available numbers for that particular exchange and service type appears.
15. Select a number from the list. Depending on the availability, the list is populated.
16. Click OK. The number is selected.
17. Click Reserve Number. The Service Id (Ph #) number is reserved.
18. Click Accessory Check. The feasibility of the accessories selected is verified.

    Note: After the Accessory Check is successful, Validate button is enabled.

19. Click Validate. The mandatory changes made are verified.

    Note:

20. If any of the information is missing, an alert is displayed with an appropriate message. For example, if a plan is not selected, an alert, Please Select at least one plan, appears.
21. Fill in the relevant details and navigate to the Orders Screen. Click Validate.
22. If the information provided is complete and correct, the order is validated successfully. A dialog box with the message: Validations are successful appears.
23. Click Submit Order. The order is submitted to the downstream systems.

    Note:

    Upon successful submission of the order, a message, Order is submitted successfully, appears. The order is submitted to the downstream systems for further processing. After the process is completed, the response messages are received from the downstream systems.

    CRM Order Id is the Reference Number to search a particular record in the Clarity System for generating a Service Order Number (SO number).

24. Click Orders List link. The Orders List View appears.
25. Click Order Number. The Orders Detail View appears.
26. Click Milestones View tab. The Orders – Milestones View appears.

Note: The status updates from the downstream systems can be viewed. After completing the process in the Provisioning Application (Clarity), the order details are sent to the Billing System (Kenan). After the processing of the order is successful in Billing, a message is sent to the CRM system.

27. Check the status message from the Billing System in the Milestones View to confirm that number for the child Call Hunting Group is changed.
28. Copy (Ctrl + C) the phone number from the Service Id (Ph #).
29. Click Services screen. Search on Service Id (Ph #) copied above.
30. Click Query. The service record appears.
31. Click Service #. The Services Detail View appears.
32. Verify and confirm the details in the Services Detail View. By default, the Service Details – Components View appears. Check if the product components requested are provisioned as per the customer's requirement.

5.9 Disconnection of pilot number

Prerequisites to proceed: The customer should have an existing Call Hunting group connection

Users: CSR

To disconnect Call Hunting Group with landline disconnection:

1. Click Customer Accounts. The Customer Accounts Home View appears.
2. Enter any or all the values in the Search fields.
3. Click Go. The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type as Disconnect.
5. Click Ctrl + S. The record is saved.
6. Click Disconnect. The Orders Detail View appears. The details of the current order being created appear.

   Note:

   i. An Activity for the disconnect order is created.
   ii. An order with the Order Type as Disconnect is created.
   iii. Activity created is of Type Retention Approval.
   iv. An alert is sent to the CSRRTN Home Page.
   v. Click Alert#. The Orders – Activities View appears.

   Note: CSRRTN can either Approve/Reject an activity.

7. Click Reject. The status of an activity changes to Cancelled and Order Status changes to Cancelled.
8. Click Approve. If the Comments field is null, an alert, Comments should not be null appears. Enter the Comments field and click Approve. The status of an activity changes to Approved and the status of an order changes to Submission in Progress.

   Note:

   i. If the order is submitted successful, the Status changes to Submission In Progress. A dialog box with Order is submitted successfully appears.
   ii. The order is submitted to the down stream systems for further processing. Response messages are received from the down stream systems on completion of process
   iii. CRM Order Id is the Reference Number to search a particular record in Clarity for generating a Service Order Number (SO number)

iv. The Status field value becomes In Progress and Completed thereafter indicating the completion of the order after which the Service will be disconnected for the customer. Once the order gets completed, the view becomes completely read only for the user.

9. Click Milestones View tab. The Orders – Milestones View appears.

   Note:

   i. The Type field in this view indicates the downstream systems in which the order is pending. Status field provides the status of the order in that respective system.

   ii. If the Status field in this view is Completed, the Status field in the upper applet is Completed indicating that the order has been completed.

10. Copy (Ctrl + C) the phone number of the customer from the Service Id (Ph #) field.
11. Click Services screen. The Services Home View appears.
12. Paste (Ctrl + V) the copied phone number in the Service Id (Ph #) field. A record with the phone number for which the Status is Inactive appears.
13. Click the corresponding Service #. The Services – Components View appears. In the lower applet, under the Product field, all the Facilities, Plans, Schemes with Status as Inactive appears.

5.10Disconnection of child number

To disconnect a child record from the Call Hunting Group with landline disconnection, the customer should have an existing landline connection and Call Hunting Group facility.

For disconnecting the child number, see **Disconnection of pilot number**

5.11Facility and Accessory Provisioning for Call Hunting Group

Users: CSR

For a facility and accessory provision for Call Hunting Group, the customer should have an existing Call Hunting Group facility.

To provision a new facility and accessory for a Call Hunting Group connection:

1. Click Customer Accounts. The Customer Accounts Home View appears.
2. Enter any or all the values in the Search fields.
3. Click Go. The Customer Accounts – Account Summary View appears.
4. Select Order Sub Type as Change in Service.
5. Click Save or Ctrl+S. The record is saved.
6. Click Modify. An order with the Order Type as Modify is created. The Orders Detail View appears with all the details of the current order being created.
7. Click Customize to select the Plan, Facilities, Accessories and the Schemes. The customer can customize the product according to the requirement.
8. Click Facilities tab to select the facilities.
9. Click Accessories tab to select the requested accessories of the choices provided. By default, LL NON CLI PHONE is selected.
10. Click Done to accept all the information provided. The Orders – Line Items View with the selected products appears.
11. Click Accessory Check. The feasibility of the new order is verified.

    Note: The Sub Status changes from Pending to Accessory Check Done.

12. Click Validate. The mandatory changes that have been made are verified.

Note: If the validations are successful, the Sub Status changes to Validation Successful. A dialog box with Validations are Successful appears.

13. Click Demand Note. The Demand Note View appears.

    Note: The Demand Note is generated for the requested facility.A record with the Demand Note Number and the amount if any, to be paid by the customer appears.

14. Click Submit Order. The order is submitted to the downstream systems.

    Note: Status is Submission in Progress and the Sub Status is Validation Successful.

15. After the order is completed after which the facility is provisioned to the customer, the Status becomes In Progress and Completed.
16. Once the order is completed, the view becomes non-editable.
17. Click Milestones View. The Type field in this view indicates the downstream systems in which the order is pending. Status provides the status of the order in that respective system.
18. Note: If the Status field in this view is completed, the Status field in the upper applet is Completed indicating that the order has been completed.
19. Copy (Ctrl + C) the phone number of the customer from Service Id (Ph #).
20. Click Services screen. The Services Home View appears.
21. Click Services List link. The Services List View appears.
22. Paste (Ctrl + V) the copied phone number in Service Id (Ph #). A record with that particular phone number and the Status as Active appears.
23. Click the corresponding Service #. The Services – Components View appears. In the lower applet, under the Product field, the added facility that has been added appears.

6 Business Scenarios - ISDN

6.1 New ISDN Connection

For creating a new ISDN BRI/ISDN PRI connection, an order has to be created. Once the order is created, the processing of the order is controlled by exchanging the messages between the downstream systems, that is, Clarity and the Billing system. Depending on the request received from CRM, the Clarity system controls the required configurations either manually or automatically and sends the feedback to CRM in the form of controlled messages. Once the order is provisioned, system automatically creates an Asset against that particular order. In other words, an Asset is created for every provision order completed.

Prerequisites to proceed:

- User should login into the CRM application
- User should have prior knowledge about the New ISDN Connection
- User should be assinged the role of CSR or CO in the profile

6.1.1 Creating a New ISDN BRI/ISDN PRI New Connection

Users: CSR/CO

To create a new ISDN connection, details of the customer should be entered in a particular order: **Customer Accounts ➔ Contacts ➔ Billing Accounts ➔ Orders.**

1. Click Customer Accounts. The Customer Accounts Home View appears.
2. Click Customer Accounts List link. The Customer Accounts List View appears.
3. Click New. A blank record is created and is highlighted in yellow.

   Note: Customer Id and Status are auto-populated.

   i. Enter the information in the mandatory fields: Account Name (Surname, First Name), and Account Type.

   Note:

   ii. To refresh or delete the record you just entered, press **Esc** button.

   iii. Once the Account Name is entered, it becomes a hyperlink.
4. Click **Account Name**. The Customer Accounts – Accounts Summary View appears. In this view, information should be provided in the following view tabs:
   - Addresses
   - Contacts
   - Billing Accounts
5. Click Addresses view tab. The Customer Accounts – Addresses View appears.
6. Click New (in the lower applet). A new record is created and is highlighted in yellow.
7. Enter the information in all the mandatory fields: Billing Address, Billing Correspondence Address and Installation Address. By default, Installation Address is selected.
8. Click Contacts view tab located next to the Accounts Summary view tab. The Customer Accounts – Contacts View appears.
9. Click New (in the lower applet). A blank record is created and is highlighted in yellow.
10. Enter the information in all the mandatory fields: Surname, Name, Preferred Communication Method and Preferred Communication Language.

Note: Once the Account Name is entered, Customer Id is auto-populated.

11. Click the down arrow located next to Accounts Summary. A dropdown list appears.
12. Click Billing Accounts view tab. The Customer Accounts – Billing Accounts View appears.
13. Click New (in the lower applet). A blank record is created and is highlighted in yellow.

    Note: Billing Account Number, Status and other fields are auto-populated.

14. Enter the information in the mandatory fields: Billing Account Type, Billing Account Sub Type, Frequency, Preferred Language Name, Bill Period, Billing Address, and Billing Corresponding Address.
15. Click Ctrl + S. The record is saved.
16. Click Orders screen. The Orders Home View appears.
17. Click Orders List link. The Orders List View appears.

    OR

    Click Orders view tab in the Customer Accounts screen. The Orders Detail View appears.

18. Click **New** (in the lower applet)**.** A blank record is created and is highlighted in yellow.

    Note: Order Number, Order Type and Order Sub Type and other fields are auto-populated.

19. Enter the information in the mandatory fields: Billing Account, Address, Connection Type as Permanent and Usage Code.
20. Select the Service Line as Basic Phone Service, Service as Wire line, Service Type as ISDN, Service Sub Type as ISDN BRI or ISDN PRI.
21. Click Centrex/ISDN Group Id. The Centrex/ISDN Group Number pick applet appears. Select the new ISDN Group Number.
22. Note: Depending on the Service Sub Type selected, ISDN Group List is filtered and displayed.
23. Click Order Number. The Orders – More Info View appears.
24. Click Line Items view tab. The Orders – Line Items View appears.
25. Click New. A new line item is added.
26. Enter the information in all the mandatory fields: Nominee Name, Nominee Relation and Product.

    Note: Depending on the Service Type selected, Products are filtered and displayed.

27. Click Line #. The details of the products selected can be viewed.
28. Click Customize to select the Plan, Facilities, Accessories and Schemes. The customer can customize the product according to the requirement.
29. Click Plans tab to select the ISDN BRI/ISDN PRI plans. By default, None is selected. Only one option can be selected at a time.
30. Click Facilities tab to select the facilities.
31. Click Calling Level tab to select the customer's choice for Local, STD and ISD. By default, Local is selected.
32. Click Accessories tab to select the customer requested accessories.
33. Click Done to accept all the information provided. The Orders screen appears with the selected products under the Line Items tab.
34. Click Available Numbers. A list with all the available numbers for that particular exchange and service type appears.
35. Select a number from the list. Depending on the availability, the list is populated.
36. Click OK. The number is updated in Orders – Line Items View.
37. Click ISDN Group tab. The ISDN Group View appears.
38. Enter the information in the No of Junctions, No of Extensions, No of Incoming Channels, No of Outgoing Channels as per the requirement.

Note: Group details can be modified if the Service Sub Type is ISDN PRI.

39. Click **Reserve Number**. The ISDN number is reserved. All the requested extensions are reserved.

    Note: Reserved numbers are displayed in the Extension Numbers applet in ISDN Group tab. Once the numbers are reserved, the Accessory Check button is enabled.

40. Click **Accessory Check.** The feasibility of the accessories selected is verified.

    Note:

    i. After the Accessory Check is successful, Validate button is enabled.
    ii. If any of the information is missing, an alert is displayed with an appropriate message. For example, If a plan is not selected, an alert: *Select at least one plan appears.*

41. Click Orders screen. The Orders Home View appears.
42. Click Orders List link. The Orders List View appears.
43. Click Order #. The Orders Detail View appears.
44. Click Validate. If the information provided is complete and correct, the order is validated successfully. A dialog box with the message: Validations are successful, appears.

    Note: Demand Note button is enabled after the validations.

45. Click **Demand Note**. The Demand Note View appears.

    Note: If the Total Amount in the Orders screen is Rs. 0.00, then the Submit Order button is activated without any payments (Make Payment button is disabled in the Demand Note Tab).

46. Click **Make Payment**. Based on the amount generated, the customer may have to pay the deposit as well as the other charges.

    Note:

    i. Once the payment is made, a Receipt Number is auto generated in CRM.
    ii. Submit Order button is enabled after the payment details are entered.

47. Click **Submit Order.** Upon successful submission of the order, a dialog box with the message, *Order is submitted successfully*, appears. The order is submitted to the downstream systems for further processing. After the process is completed, the response messages are received from the downstream systems.
48. CRM Order Id is the Reference Number to search a particular record in the Clarity System for generating a Service Order Number (SO number).
49. Click Orders List link. The Orders List View appears.
50. Click Order Number. The Orders Detail View appears.
51. Click **Milestones** view tab. The Orders – Milestones View appears.

    Note: The status updates from the downstream systems can be viewed here. After the process in the Provisioning Application (Clarity) is completed, the order details are sent to the Billing System (Kenan). After the processing of the order is successful in Billing, a message is sent to the CRM system.

52. Check the status message from the Billing System in the Milestones View to confirm that the new ISDN BRI/ISDN PRI connection has been created.
53. Copy (Ctrl + C) the phone number from the Service Id (Ph #).
54. Click Services screen. The Services Home View appears.
55. Paste (Ctrl + V) the phone number in the Service Id (Ph #) field.
56. Click Query. The service record appears.
57. Click Service #. The Services Detail View appears.

58. Verify and confirm the details in the Services Detail View. By default, the Services – Components View appears. Check if the product components requested are provisioned as per the customer's requirement.

6.2 Creating ISDN Modify Order

6.2.1 Facility Provisioning for ISDN

Users: CSR/CO

Prerequisites to proceed: For a facility to be provisioned, the customer should have an existing ISDN service.

To provision a new facility for an ISDN connection:

1. Click Customer Accounts. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search field.
3. Click Go. The Customer Accounts List View appears.
4. Click Account Name. The Customer Accounts – Account Summary View with the records that satisfy the criteria appears.
5. Click Order Sub Type. A dropdown list appears.
6. Select Order Type as Change in Service.
7. Click Ctrl + S. The record is saved.
8. Click Modify. A modify order is created and order detail view appears.
9. Click Line Items view tab. The Orders – Line Items View appears.
10. Click Customize. The product configurator view appears.
11. Click Facilities. The facilities enlisted for the current service appear.

    Note: Select the facilities required. More than one facility can be selected.

12. Click Done. The Orders Detail View appears. The details of the current order being created appear.
13. Click Accessory Check. The feasibility of the new facility is verified.

    Note: The Sub Status value changes from Pending to Accessory Check Done.

14. Click Validate. The mandatory changes that are made are validated for correctness.

    Note: The Sub Status changes to Validation Successful. If the validations are successful, a message, Validations are successful, appears.

15. Click Demand Note. The Demand Note View for the requested facility is generated.

    Note: A record with the Demand Note Number and the amount, if any, to be paid by the customer, appears.

16. Click Submit Order. The order is submitted to the downstream systems.

    Note: The Status field displays Submission in Progress and the Sub Status displays Validation Successful.

17. The system automatically picks up the order for submission to down stream system (Clarity). Then the Status field value becomes In Progress. Once the order is completed, that is, after the facility is provisioned for the customer, the Status becomes Completed. Once the order is completed, the view becomes completely non-editable.
18. Click Milestones view tab. The Orders – Milestones View appears.

Note: The Type field indicates with which downstream system the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view is Completed, the Status field in the upper applet is also Completed indicating that the order has been completed.

19. Copy (Ctrl + C) the phone number of the customer from the Service Id (Ph #) field.
20. Click Services screen. The Services Home View appears.
21. Click Services List link. The Services List View appears.
22. Paste (Ctrl + V) the phone number. A record with the phone number whose Status value is Active appears.
23. Click the corresponding Service #. The Services – Components View appears.

Note: In the lower applet, under Product field, the facility that has been added is seen.

6.2.2 Facility Disconnection for ISDN

Users: CSR/CO

Prerequisites to proceed: The customer should have an existing ISDN connection and the facility to be disconnected provisioned.

To disconnect an existing facility from an ISDN connection:

1. Follow Step 1 to Step 10 in the Facility Provisioning for ISDN
2. Unselect the facilities to be disconnected.
3. Click Done. The Orders Detail View appears. The details of the current order being created appear.
4. Follow Step 12 to Step 21 in the Facility Provisioning for ISDN

6.2.3 Accessory Provisioning for ISDN

Users: CSR/CO

Prerequisites to proceed: Customer should have an existing ISDN connection.

Note: Accessory provisioning is allowed only for ISDN BRI (Accessories are not available for ISDN PRI)

To provision a new accessory for an ISDN BRI connection:

1. Follow Step 1 to Step 9 in the **Facility Provisioning for ISDN**
2. Click **Accessories**. The accessories enlisted for the ISDN BRI service are:
    - NT Box
3. Select NT Box. More than one accessory can be selected.
4. Click **Done**. The Orders Detail View appears. The details of the current order being created appear.

    Note: Quantity of the selected accessory can be changed in the Line Items tab.
5. Follow Step 12 to Step 21 in the **Facility Provisioning for ISDN**

6.2.4 Pilot Number Change for ISDN

Prerequisites to proceed: To change the pilot number (Indicator), the customer should have an existing ISDN facility:

To change the pilot number:

1. Follow Step 1 to Step 8 in the **Facility Provisioning for ISDN.**
2. Click **Available Numbers**. A list with all the Available Numbers for that particular exchange and Service Type are populated.
3. Select a number from the list. Depending on the availability, the list is populated.
4. Click **OK**. The selected number is updated in the order detail view.
5. Click **Reserve Number**. The new ISDN Pilot Number is reserved.
6. Follow Step 12 to Step 21 in the **Facility Provisioning for ISDN.**

6.2.5 Adding DIDs for ISDN

Note: DIDs can be added only on an ISDN PRI connection.

To change the count of DIDs, the customer should have an existing ISDN PRI facility.

1. Follow Step 1 to Step 8 in the **Facility Provisioning for ISDN.**
2. Click **ISDN Group** View tab. Update the the **No of Extensions** and save the record.

   Note: Verify that the Extension Numbers section displays the updated number of rows one for each extension number.

3. Click **Reserve Number**. The new DIDs against the group is reserved.

   Note: The DIDs that are created appear in the Extension Numbers applet and the Status as *Reserved.*

4. Click **Accessory Check**. The Sub Status value changes from *Pending* to *Accessory Check Done.*
5. Click **Submit Order**. The order is submitted to the downstream systems.

   Note:

   i. The Status field displays *Submission in Progress* and the Sub Status displays *Validation Successful*.

   ii. The Status field value becomes *In Progress*. Once the order is completed, that is, after the facility is provisioned for the customer, the Status becomes *Completed*. Once the order is *Completed,* the view becomes completely non-editable.

6. Click **Milestones** view tab. The Orders – Milestones View appears.

   Note: The Type field indicates the downstream system with which the order is pending. The Status field provies the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet displays *Completed* indicating that the order is completed.

7. Click **ISDN Group** tab. The ISDN Group View appears. The status of the newly reserved numbers(DIDs) changes from *Reserved* to *Active* with Active Date populated.

6.2.6 Deletion of DIDs for ISDN

Note: DIDs can be deleted only on ISDN PRI.

To change the count of DIDs, the customer should have an existing ISDN PRI facility.

1. Follow Step 1 to Step 8 in the **Facility Provisioning for ISDN.**
2. Click **ISDN Group** tab. The Orders – ISDN Group View appears
3. Decrease the value in No of Extensions.
4. Provide the End Date against the DIDs that are being deleted in the Extension Numbers Applet.
5. Click **Accessory Check**. .The Sub Status field value changes from *Pending* to *Accessory Check Done.*
6. Click **Submit Order**. The order is submitted to the downstream systems.

   Note:

   i. The Status field displays *Submission in Progress* and the Sub Status displays *Validation Successful*.

   ii. The Status field value becomes *In Progress*. Once the order is completed, that is, after the facility is provisioned for the customer, the Status becomes *Completed.* Once the order is completed, the view becomes completely non-editable.

7. Click **Milestones** view tab. The Orders – Milestones View appears.

   Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet displays *Completed* indicating that the order has been completed.

8. Click **ISDN Group** tab. The Orders – ISDN Group View appears.

   Note: The status of the deleted DIDs are populated with the End Date. Verify the status of the DIDs that are populated with End Date and the Status changes from *Active* to *Inactive*.

6.2.7 Increase of Junctions for ISDN

Note: Number of Junctions can be increased only for ISDN PRI.

1. To change the No of Junctions, the customer should have an existing ISDN PRI facility:
2. Follow Step 1 to Step 8 in the Facility Provisioning for ISDN
3. Click ISDN Group tab. The Orders Detail View is displayed
4. Increase the value in No of Junctions.
5. Click Reserve Number. The new ports for the new junctions in the Clarity system are reserved.
6. Click Accessory Check. The Sub Status value changes from Pending to Accessory Check Done.
7. Click Submit Order. The order is submitted to the downstream system.

Note:

i. The Status field displays Submission in Progress and the Sub Status displays Validation Successful.

ii. The Status field value becomes In Progress. Once the order is completed, that is, after the facility is provisioned for the customer, the Status becomes Completed. Once the order is completed, the view becomes completely non-editable.

8. Click **Milestones** view tab. The Orders – Milestones View appears.

   Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet displays *Completed* indicating that the order has been completed.

   Note: Scenarios **6.2.1** to **6.2.7** can be performed Individually or with any combination. Note that for all the Modify scenarios only one Order Sub type *Change in Service* is allowed.

6.3 Creating ISDN Shift Orders

6.3.1 Shift of ISDN within the Exchange (without number change)

Users: CSR/CO

To Shift an ISDN connection, the customer should have an existing ISDN service. Before the Shift process is started, it is required that the entry of the new installation address has the same exchange type (which is provided in the Customer Accounts – Addresses view for that particular customer)

To shift the ISDN process within the same exchange without the number change:

1. Click Customer Accounts screen. The Customer Accounts Home View appears.
2. Enter any or all the values in the Search field.
3. Click Go. The Customer Accounts List View appears.
4. Click Account Name. The Customer Accounts – Account Summary View appears.
5. Click Addresses view tab. The Customer Accounts – Addresses View appears.
6. Click New. A record with the Address Type as Installation Address appears.
7. Note: Installation Address, Billing Address and Billing Corresponding Address are mandatory.
8. Click Account Summary view tab. The Customer Accounts – Account Summary View tab appears. The services provided to that particular account appears.
9. Select the Order Sub Type as Shift Within exch w/o NumChg.
10. Click Ctrl + S. The record is saved.
11. Click Shift. At this point, two orders are created.
12. First, with the Order Type as Shift and Order Sub Type as Shift Within exch w/o NumChg (Child order or Reconnection order)
13. Second, with the Order Type as Shift and Order Sub Type as Disconnect (Parent order or Shift-Disconnect order)

14. The Orders Detail View of the child order appears.

15. Click More Info view tab. The Customer Accounts – More Info View appears.

16. Select Nature Of Shift from the following three options:

    - Shift CRD
    - Shift when feasible
    - Shift Immediate
    - If the Nature of Shift is *Shift CRD:*

In this scenario, shift takes place on the date requested by the customer. The Accessory Check button is active.

Note: If the Installation Address is not changed, an alert is generated.

i. Click **Accessory Check**. The Sub Status changes from *Pending* to *Accessories Check Done*.

ii. Enter the Customer Requested Date as per the date requested by the customer.

Note: Change in Customer Requested Date can be made only after the Accessory Check is completed and before you click the Validate button.

17. Click Validate. A message, Validations are successful, appears.

18. Click Submit Order. The order is submitted to the downstream systems.

19. The Status field displays Submission in Progress and the Sub Status displays Validation Successful.

20. The Status field value becomes In Progress. Once the order is completed, that is, after the facility is provisioned for the customer, the Status becomes Completed. Once the order is completed, the view becomes completely non-editable.

21. Click Milestones view tab. The Orders – Milestones View appears.

    Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet displays *Completed* indicating that the order has been completed.

    - If the Nature of Shift is *Shift When Feasible*:

In this scenario, the shift takes place whenever it is feasible for BSNL. The Accessory Check button is active. If the Installation Address is not changed, an alert is generated.

22. Click Accessory Check. The Sub Status changes from Pending to Accessories Check Done.

23. Click Validate. A message, Validations are successful, appears.

24. Click Submit **Order**. The order is submitted to the downstream systems.

    Note:

    i. The Status field displays *Submission in Progress* and the Sub Status displays *Validation Successful*.

    ii. The Status field value becomes *In Progress*. Once the order is completed, that is, after the facility is provisioned for the customer, the Status becomes *Completed.* Once the order is completed, the view becomes completely non-editable.

25. Click **Milestones** view tab. The Orders – Milestones View appears.

    Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view shows *Completed*, the Status field in the upper applet shows *Completed* indicating that the order has been completed.

    - When Nature of Shift is *Shift Immediate*:

In this scenario, the disconnect order order (parent order) should be completed before the child order.

Note: Submit Order and the Available Numbers button are activated. If the Installation Address is not changed, an alert is generated.

26. Click **Accessory Check**. The Sub Status field changes from *Pending* to *Accessories Check Done*.

    iii. **Note:** If an alert is generated during the Accessory Check to remove the accessories that have status as *Not Feasible*, then the accessories under Line Items with Status field as *Delete*, should be removed and then click the Accessory Check button.

27. Click Validate. A message, Validations are successful, appears.

28. Click Submit Order. The order is submitted to the downstream systems.

29. The Status field displays Submission in Progress and the Sub Status displays Validation Successful.

30. The Status field value becomes In Progress. Once the order is completed, that is, after the facility is provisioned for the customer, the Status becomes Completed. Once the order is completed, the view becomes completely non-editable.

31. Click Milestones view tab. The Orders – Milestones View appears.

    Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view shows *Completed*, the Status field in the upper applet shows *Completed* indicating that the order has been completed.

32. Click Submit Order. A message, Disconnection (parent) Order is submitted successfully, appears. The Submit button becomes inactive.

    Note: The user can proceed with the Reconnection (child) Order. The Status field value of the Parent Order becomes *Submission in Progress*.

33. Click Accessory Check. The Sub Status field changes from Pending to Accessory Check Done.

34. Click Validate. A message, Validations are successful, appears. The Sub Status field value changes to Validation Successful.

35. Click Submit Order. The order is submitted to the downstream systems.

36. The Status field displays Submission in Progress and the Sub Status displays Validation Successful.

37. The Status field value becomes In Progress. Once the order is completed, that is, after the facility is provisioned to the customer, the Status becomes Completed. Once the order is completed, the view becomes completely non-editable.

38. Click Milestones view tab. The Orders – Milestones View appears.

39. Note: The Type field indicates with which downstream system the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view shows Completed, the Status field in the upper applet shows Completed indicating that the order has been completed.

6.3.2 Shift of ISDN within the Exchange (with number change)

Users: CSR/CO

Prerequisites to proceed: To shift an ISDN connection, the customer should have an existing ISDN service.

Note:

i. Before the shift process is started, it is required that the new Installation Address has the same Exchange Type as the previous Installation Address (which is provided in the Customer Accounts – Addresses view for that particular customer)

ii. New ISDN Group has to be created in the ISDN Group View tab with the Group Type as the Service Sub Type (ISDN PRI or ISDN BRI)

To shift the ISDN process within the same exchange and with number change:

1. Click Customer Accounts screen. The Customer Accounts Home View appears.

2. Enter any or all the values in the Search field.

3. Click Go. The Customer Accounts List View appears.

4. Click Account Name. The Customer Accounts – Account Summary View appears.

5. Click Addresses view tab. The Customer Accounts – Account Summary View appears.

6. Click New. A new record with the Address Type as Installation Address appears.

7. Click Account Summary view tab. The Customer Accounts – Account Summary view appears. The services provided to that particular customer appear.

8. Select the Order Sub Type field as Shift Within exch w/o NumChg.

9. Click Ctrl + S. The record is saved.

10. Click Shift. The Orders Detail View appears. At this point, two orders are created.

    Note: First, with the Order Type as Shift and Order Sub Type as Shift Within exch with NumChg (Child order or Reconnection order)
    Second, with the Order Type as Shift and Order Sub Type as Disconnect (Parent order or Shift-Disconnect order)

11. The Available Numbers button is activated.

12. Select a new installation address from the Address pick applet.

13. Click More Info view tab. The Customer Accounts – More Info View appears.

14. Select Nature Of Shift from the following three options:

    - Shift CRD
    - Shift when feasible

- Shift Immediate

If Nature of Shift is *Shift CRD:*

Note: The Available Numbers button is activated.

15. Click Available Numbers. A list containing the phone numbers available in the current exchange appears.

16. Select a number from the list. The selected number appears in Service Id (Ph #) field.

17. Click ISDN Group Applet. The Centrex/ISDN Group Number pick applet appears. Select the ISDN Group Number created.

18. Click Reserve Number. The Sub Status field becomes Port Available.

19. Click Accessory Check. The Sub Status field changes to Accessories Check Done.

20. Enter the Customer Requested Date field as the requested by the customer.

    Note: The date cannot be less than the current date.

21. Click Validate. A message, Validations are successful, appears. The Sub Status field changes to Validation Successful.

22. Click Submit Order. The order is submitted to the downstream systems.

    Note:

    i. The Status field displays *Submission in Progress* and the Sub Status displays *Validation Successful*.
    ii. The Status field value becomes *In Progress*. Once the order is completed, that is, after the facility is provisioned for the customer, the Status becomes *Completed.* Once the order is completed, the view becomes completely non-editable

23. Click **Milestones** view tab. The Orders – Milestones View appears.

    Note: The Type field indicates with which downstream system the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet displays *Completed* indicating that the order has been completed.

    - When Nature of Shift is *Shift When Feasible*

24. Click **Available Numbers**. A list containing phone numbers available in the current exchange appears.

25. Select a number from the list. The selected number appears in Service Id (Ph #).

26. Click Centrex/IDSN Group ID pick applet. The Centrex/ISDN Group Number applet appears. Select the ISDN Group Number created.

27. Click Reserve Number. The Sub Status field becomes Port Available.

28. Click Accessory Check. The Sub Status field changes to Accessories Check Done.

29. Click Validate. A message, Validations are successful, appears. The Sub Status field value changes to Validation Successful.

30. Click Submit Order. The order is submitted to the downstream systems.

Note:

i. The Status field displays *Submission in Progress* and the Sub Status field displays Validation Successful.

ii. The Status field value becomes In Progress and Completed thereafter indicating the completion of both the orders (child and parent orders). Once the order is completed, the view becomes completely read only for the user.

31. Click **Milestones** view tab. The Type field indicates with which downstream system the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view shows *Completed*, the Status field in the upper applet shows *Completed* indicating that the order has been completed.

    - If Nature of Shift is *Shift Immediate:*

In this scenario, the disconnect order (parent order) should be completed before the child order.

Note: The Submit Order and Available Numbers buttons are activated. If the Installation Address is not changed, an alert is generated.

Case 1: When you click Available Numbers button.

1. Click Available Numbers. A list containing phone numbers available in the current exchange appears.
2. Click Centrex/ISDN Group Id pick applet. The Centrex/ISDN Group Number applet appears. Select the ISDN Group Number created.
3. Click Reserve Number. The Sub Status field becomes Port Available.
4. Select a number from the list. The selected number is populated in the Service Id (Ph #).
5. Click Accessory Check. The Sub Status field value changes to Accessories Check Done.
6. Click Validate. A message, Validations are successful, appears.
7. Click Submit Order. The order is submitted to the downstream systems.
8. The Status field displays Submission in Progress and the Sub Status displays Validation Successful.
9. The Status field value becomes In Progress. Once the order is completed, that is, after the facility is provisioned for the customer, the Status becomes Completed. Once the order is completed, the view becomes completely non-editable
10. Click Milestones view tab. The Type field indicates which downstream system the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view shows Completed, the Status field in the upper applet shows Completed indicating that the order has been completed.
11. Case 2:When you click Submit Order button:
12. Click Submit Order. A message, Disconnection (parent) Order is submitted successfully, appears.
13. Note: Submit button becomes inactive. Proceed to the Reconnection (child) order. The Status field of the parent order becomes Submission in Progress.
14. Click Available Numbers. A list containing the available phone numbers in the current exchange appears.

15. Select a number from the list. The selected number appears in Service Id (Ph #).
16. Click Centrex/ISDN Group ID pick applet. The Centrex/ISDN Group Number applet appears. Select the ISDN Group Number that has been created.
17. Click Accessory Check. The Sub Status field changes from Pending to Accessory Check Done.
18. Click Validate. A message, Validations are successful, appears. The Sub Status changes to Validation Successful.
19. Click Submit Order. The order is submitted to the downstream systems.

    Note: The Status field displays Submission in Progress and the Sub Status displays Validation Successful.

20. The Status field value becomes In Progress. Once the order is completed, that is, after the facility is provisioned for the customer, the Status becomes Completed. Once the order is completed, the view becomes completely non-editable.
21. Click Milestones view tab. The Orders – Milestones View appears.
22. Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view shows Completed, the Status field in the upper applet shows Completed indicating that the order has been completed.

6.3.3 Shift of ISDN Across Exchanges (and within zones)

Users: CSR/CO

For Shift of ISDN Across Exchanges within the same zone, See Shift of ISDN within the Exchange (with number change)

There are two major differences between Shift of ISDN Across Exchange and Shift of ISDN within Exchange with Number change:

- For Shift of ISDN within same exchange with number change, the new Installation Address has to be the same exchange as its previous address.
- For Shift of ISDN across Exchange should have different where as for the first scenario, the exchange type of the new installation address has to be different.
- The Order Sub Type for the latter is “Shift Within exch with NumChg” where as for the first scenario it is “Shift Across exchanges”.

6.3.4 Shift of ISDN Across Zones

In this scenario, the service is disconnected in one zone and a completely new service is provided in an other zone. Each zone, for example, South Zone CRM, North Zone CRM, has a separate CRM application.

The only way to identify the customer who has shifted from one zone to the other is by the **Transfer Flag** check box in **Orders** screen.

To find out whether a customer had an account previously with BSNL in another zone:

1. Click **Orders** screen. The Orders Home View appears.

2. Enter any or all the values (for which the user can check if the account was transferred from another zone) in the Search field.

3. Click **Go**. The Orders List View for that particular account appears.

   Note: There can be one or more records.

3. Click **Order Number**. The Orders Detail View appears. In the upper applet, if the Transfer Flag check box is selected, it indicates that the account has been transferred.

6.4 Creating ISDN Disconnection Order

Prerequisities to proceed: To disconnect the ISDN service, the customer should have an existing ISDN service

1. Click **Customer Accounts** screen. The Customer Accounts Home View appears.

2. Enter any or all the values in the Search field.

3. Click Go. The Customer Accounts List View appears.

4. Click Account Name. The Customer Accounts – Account Summary View appears.

5. Select Order Sub Type field as *Disconnect*.

6. Click **Ctrl + S**. The record is saved.

7. Click **Disconnect**. The Orders Detail View appears. The details of the current order being created appear.

   Note:

   An activity is created for CSR RTN belonging to that circle. To submit the disconnection order to the downstream systems, the activity created for CSR RTN should be approved.

Activity Approval Process for CSR RTN

8. Login into the CRM application as CSR RTN. The CSR RTN Home Page appears.

   Note: The activity that has been created can be viewed in My Activities applet.

9. Click Type. The Orders – Activities View appears.

   Note: The lower applet displays the activity with status as Open. The Approve and Reject buttons are activated.

10. Click Approve. The activity is approved. The status of the activity becomes Approved. An alert is created for CSR in the CSR Home Page.

11. Click Reject. The activity is rejected. The status of the activity becomes Cancelled. The Disconnection order status changes to Cancelled. An alert is created for CSR in the CSR Home Page.

When the activity is approved:

12. Click Validate. A message, All validations are successful, appears. The Sub Status field changes to Validation Successful.

13. Click Submit Order. The order is submitted to the downstream systems.

Note: The Status field displays *Submission in Progress* and the Sub Status field displays *Validation Successful*. The Status field becomes *In Progress* and *Completed,* thereafter indicating the completion of the disconnection order. Once the order gets completed, the view becomes completely non-editable.

14. Click Milestones view tab. The Orders – Milestones View appears.

    Note: The Type field indicates the downstream system with which the order is pending. The Status field provides the status of the order in that respective system. For example, if the Status field in this view displays *Completed*, the Status field in the upper applet displays *Completed* indicating that the order has been completed.

7 Business Scenarios - Complaints

7.1 Creating a New Complaint (Technical / Billing)

Technical Complaints can be created using the following two views:

- Complaints View
- Trouble Tickets View

Using Complaints View:

1. Click Trouble Tickets. The Trouble Tickets Home View appears.
2. Click Complaints. The Trouble Tickets – Complaints View appears.
3. Click New. A new complaint is created.

Using Trouble Tickets View:

1. Click Trouble Tickets. The Trouble Tickets Home View appears.
2. Click All Trouble Tickets. The Trouble Tickets – All Trouble Tickets View appears.
3. Click New. A new complaint is created.

To create a new complaint:

User1: CSR Landline

Prerequisites to proceed: An Asset should exist.

1. Click Trouble Tickets. The Trouble Tickets Home View appears. Click on the Complaints. The Trouble Tickets – Complaints View appears.
2. Click New. A new complaint row is created with blank details except the Docket #.
3. Click Account pick applet to select the existing account. By default, Account # is auto-populated whenever an account is selected.

Note: Contact Number appears when the CSR selects the account. Contact number is the main phone number of account. The Contact Number is editable.

4. Enter the 10 digit number. The system automatically prefixes with +91.

   Note: If the number is entered in a wrong format, a message, *Contact Number should be a valid number,* appears.

5. Click Service Id to select the existing Service Id, that is, Phone Number.
6. Click Complaint Type. Select the Complaint Type s Technical.
7. Click Complaint Sub Type, and select a suitable value from the dropdown list from the complaint description from customer.

   Note: Complaint Sub Type is based on the Service Type & Complaint Type values selected. For example, If Service Type is Landline & Complaint Type is Technical, then the Complaint Sub Type values can be Cable Fault, Phone Dead, No Speech, No Ring and so on..

8. Save the complaint to system by clicking Ctrl+S. Click on the **Docket #.** The Complaints Detail View appears.

   Note: If complaint has been raised on the same Service Id and Complaint Type, a message, *The Complaint Type of this Service ID is already been Raised. Cannot Raise again,* appears. (For example, Service Id = 08417-202069 and Complaint Type = Technical, CSR cannot raise the complaint on the same Service Id. In that scenario, Click Complaint Type, The Error appears. Click OK. Provide the valid data.

Following fields are auto-populated:

- Docket# : Auto-populated
- Account# : Auto-populated when CSR selects the account
- Contact Name : Auto-populated when CSR selects the Service Id
- Channel Of Approach: Auto-populated with the value *Call Center.* If a complaint is raised from different channels, this field is updated accordingly. For example, if the complaint is raised from Web Portal, value will be Web.
- MSO# : If the complaint is raised due to Major Service Outage, this field is updated automatically
- Priority: Auto-populated with the value 3-Medium. This value is based on the Account and Asset flag values, that is, If the following values are set to True, then Priority will be updated as 1-ASAP (all below fields displayed on the screen)
- PCO Flag, VIP Flag, are auto populated and in case the connection is provided with in a month then New Connection check box would be checked.
- Date Opened: Date is auto-populated with the current system date when CSR clicks the **New** button. This field is non-editable
- Date Closed: This field is updated when the complaint is closed. When CSR clicks the Close Docket button, the current system date appears.
- Status: This field is updated when CSR clicks the New button. Initially, the Status will be Open
- Sub-Status: This field is updated automatically when the CSR clicks New button. Initially, Sub Status will be unassigned

Following Flags will be set to True based on the following conditions:

- PCO Flag : This flag will be set to True when the CSR selects the Service Id, that is, If Service is Landline-PT, then this flag will be set to True which indicated that the Service is related to PCO (public phone)
- VIP Flag: This flag will be set automatically when the CSR selects the Account. It is valid for a VIP account only
- New Connection: This flag will be set to True when the CSR selects the Service Id, that is, if the Service was provided within last 30 days only
- Repeat Flag: This flag will set be to True when the Complaint is repeatedly raised by the customer within a period of 30 days. This is applicable only if the Service Id, Complaint Type, Complaint Sub Type are same
- Escalated Flag: This flag will be set to True when the docket is escalated to the next level, that is, SLA time crosses, which means that the complaint is escalted to the next level

Installation Details

- On saving the record in step 8, based on the installation address details the following fields are updated automatically:
- Exchange Name
    - SSA
    - Circle

Fault Details

The following fields are displayed automatically, when the Clarity system sends the updates to the CRM system. All the fields are optional.

Note: These values are displayed only if the Complaint Type is Technical

- Fault Code
- Fault Description
- Fault Category
- Fault Sub Category
- Clearance Code

5. Click **Submit**. Based on the details entered the complaint is submitted to either Clarity or AOTR.

7.2 Closing the Complaint (Technical / Billing)

Prerequisites to proceed: A complaint is already raised on an existing asset.

A complaint can be closed by the CSR / FTO / AOTR based on the complaint type and sub type. In case of technical complaint, after submitting the complaint it is assigned to ITO. Once ITO resolves the complaint in Clarity system, response is received in CRM system and it is assigned to FTO.

In case of Billing complaint, on submission of complaint it is assigned to AOTR. Once AOTR resolves the status of complaint changes to Closed. In some cases CSR can find the existing solution from FAQ and close the complaint.The following sections describe the procedure in detail.

Either CSR / FTO / AOTR will close the docket

7.2.1 Closing the Complaint by CSR

6. Click Complaints. The Complaints View appears.
7. Click New. A new complaint is created.

    Note: If the CSR clicks on the Close Docket button without adding the predefined solution, a message, Please add solution before closing docket, appears. Click OK. Create a new solution to the complaint.

8. Click Trouble Tickets. The Trouble Tickets Home View appears.
9. Click Complaints link. The Complaints Detail View appears.
10. Click Solutions view tab. The Complaints – Solutions View appears.
11. Click Add. The Add Solutions applet appears. (refer the following screen shot)
12. Click Query to search for the existing record. All the related solutions are displayed.
13. Click Add located in the lower half of the applet. The solution gets attached to the Complaint Detail – Solution View.

14. Click **Close Docket**. The Complaint will be closed. It has 3 applets:
    - Complaint –Solution view
    - Add Solutions without solutions applet
    - Click on the Query & Go button →Open the Add Solutions applet with Solutions

7.2.2 Closing the Complaint by FTO

15. Login into CRM as an FTO. The FTO Home Page appears.
16. Click Alert record in My Alerts applet. The Faults Detail Applet appears. FTO would call the customer and explain and verify with the customer that the complaint is resolved.
17. Click Close Docket. The complaint is closed. The applets becomes non-editable and the following fields are updated:
    - Status = Closed
    - Close Date = <Current System Date>

7.2.3 Closing the Complaint by AOTR

User 1: CSR Landline

Note: Only the Billing complaint will be closed by AOTR.

1. The CSR creates the Billing Complaint. Click Submit. The complaint is assigned to AOTR.

User 2: AOTR

2. Login into CRM application as AOTR. The AOTR Home Page appears.
3. Click Alert # in My Alerts applet. The Complaints Detail View appears.
4. Click Close Docket. The complaint is closed and the following fields are updated in CRM.
    - Status = Closed
    - Close Date = <Current System Date>

8 Business Scenarios - Broadband

Broadband refers to the high-speed data transmission in which a single cable can carry over multiple channels over a single communication medium. The most common types of Internet Broadband connections are cable and DSL modems. It is also always-on Internet connection that provides high-speed access and downloads for a flat rate monthly charge.

8.1 New Broadband Connection

Prerequisites to proceed:

- User should login into the CRM application
- User should have prior knowledge about the New Broadband connection
- User should be assigned the role of CSR in the profile

8.1.1 Creating a New Broadband Connection

Users: CSR

To create a new Broadband connection, details of the customer should be entered in a particular order: **Customer Accounts ➔ Contacts ➔ Billing Accounts ➔ Orders.**

1. Click Customer Accounts. The Customer Accounts Home View appears.
2. Click Customer Accounts List link. The Customer Accounts List View appears.
3. Click New. A blank record is created and is highlighted in yellow.

   Note: Customer Id and Status are auto-populated.

4. Enter the mandatory fields: Account Name in the format of Surname, First Name and Account Type.

   Note:

   i. To refresh or delete the record you just entered, press Esc button.

   ii. Once the Account Name is entered, it becomes a hyperlink.

5. Click **Account Name**. The Customer Accounts – Accounts Summary View appears. Information should be provided in the following view tabs:
   - Addresses
   - Contacts
   - Billing Accounts
6. Click Addresses view tab. The Customer Accounts – Addresses View appears.
7. Click New. A new record is created and is highlighted in yellow.
8. Enter the information in all the mandatory fields: Billing Address, Billing Correspondence Address and Installation Address.
9. Click Contacts view tab located next to the Accounts Summary view tab. The Customer Accounts – Contacts View appears.
10. Click New. A blank record is created and is highlighted in yellow.
11. Enter the information in all the mandatory fields: Surname, Name, Preferred Communication Method and Preferred Communication Language.

Note: Look for Billing Account tab, if not present then click the down arrow located next to Demographics. A dropdown list appears.

12. Click Billing Accounts. The Customer Accounts – Billing Accounts View appears.
13. Click New. A blank record is created and is highlighted in yellow.

    Note: The Billing Account Number, Status fields and other fields are auto-populated.

14. Enter the information in the mandatory fields: Billing Account Type, Billing Account Sub Type, Frequency, Preferred Language Name, Bill Period, Billing Address, and Billing Corresponding Address.
15. Click Save or Ctrl + S to save the record.
16. Click Orders screen ➔ **Orders List** link. The Orders List View appears.

    OR

    Click **Orders** view tab in the Customer Accounts screen. The Orders Detail View appears.

17. Click **New.** A blank record is created and is highlighted in yellow.

    Note: Order Number, Order Type and Order Sub Type and other fields are auto-populated.

18. Enter the information in the mandatory fields: Billing Account, Address, Connection Type as Permanent/Casual/Permanent, and Usage Code.
19. Select the Service Line field as Basic Phone Service, Service as Wire line, and Service Type as Landline, Service Sub Type as Fixed Landline.
20. Click Order Number. The Orders – More Info View appears.
21. Click Line Items view tab. The Line Item view appears.
22. Click New. A new line item is added.
23. Enter the information in all the mandatory fields: Nominee Name, Nominee Relation and Product which are mandatory. Depending upon the Service Type selected, Product is filtered and displayed.
24. Click Line #. The details of the products selected can be viewed.
25. Click Customize button which is activated after the Line Items have been selected. There are several tabs in Orders View.
26. Click Plans tab to select the Landline plans. By default, None is selected. Only one option can be selected at a time.
27. Click Facilities tab to select or deselect the facilities according to the customer's requirements. By default CONDITIONAL CALL TRANSFER ON BUSY, NR ABBREVIATED DIALLING CALL and TRANSFER CALL WAITING are selected
28. Click Calling Level tab to select the customer's choice for Local, STD and ISD. By default, Local is selected.
29. Click Accessories tab to select the requested accessories of the choices provided. By default, LL NON CLI PHONE is selected.
30. The remaining tabs can be customized individually depending on the requirement of the customer.
31. Click Done to accept all the information provided. The Orders screen appears with the selected products under the Line Items tab.
32. Click Available Numbers. A list with all the available numbers for that particular exchange and Service Type appears.
33. Select a number from the list. Depending on the availability, the list is populated. Click OK. The number is updated in the line items.
34. Click Reserve Number. The Landline number is reserved. All the requested extensions are reserved and the Accessory Check button is enabled.

35. Click Accessory Check to check the feasibility of the accessories. After the Accessory Check is successful, Validate button is enabled.
36. Set the Broadband Required Flag to ‘Y’.
37. Click Validate. If any of the information is missing, an alert is displayed with an appropriate message.
38. For example, If a plan is not selected, an alert with the message, Select atleast one plan, appears. Fill in the relevant details and navigate to the Orders screen and click Validate.
39. If the information provided is complete and correct, then the order is validated. A message, Validations are successful, appears. Click OK.
40. Note: The Sub-Status of the Landline order becomes Validation Successful and Follow On button, which is present at the Line Item List Applet near Customize button, is enabled.
41. Click Follow On. The Product Configuration View appears.
42. Note: There are two tabs in this view: Broadband and LL Plans.
43. Select Broadband. By default None is selected.

    Note:

    a. The LL Plan tab is provided for reference of the existing Landline plans with that customer.

    b. A red colored star appears besides Broadband tab. This implies that its mandatory details to provide the broadband.

44. Click . The Broadband Product Configuration View appears. CSR has two options here. They are:
45. Click Finish It to select the default values for Plan, Modem Types, Static IP Component, Facilities, Deposit Schemes, Rental Schemes and Installation Schemes. Although default values appear, CSR can still select other values for all the tabs, namely Plan, Modem type and so on.

    OR

    Manually select Plan, Modem Types, Static IP Component, Facilities, Deposit Schemes, Rental Schemes and Installation Schemes according to the customer’s requirement.

    i. Click Plans tab to select the Broadband plans. Only one plan can be selected at a time, that is, BB Normal Plan, BB Committed Plan, Combo committed plan or Combo Normal Plan.

    ii. Click customize icon in case of BB Normal Plan and Combo Normal Plan. Select the appropriate option.

    iii. Go back to Broadband Product Configuration View. Click Modem Type and select the appropriate type.

    iv. Click customize icon . Select the corresponding acquisition type and Installation Required Flag.

    v. Go back to Broadband Product Configuration View. Click Static IP Component and select the appropriate component.

    vi. The remaining tabs can be customized individually depending on the requirement of the customer.

46. Click **Done** to accept all the information provided. The Broadband Detail View appears with the selected products under the Line Items tab.

Note: Order type of the new order created is *Modify* and Sub type is Broadband Provision. Landline Order tab displays the corresponding Landline order.

47. Enter User Id and Email against the Broadband product.

    Note: The number of e-mails should be equal to the number of e-mails eligible for the plan that includes the primary e-mail which is created automatically when the User Id is created successfully.

48. Click **User Id Creation**. The User Id is created.

    Note: If the creation is successful, then:

    - Sub Status changes to *Validation Successful*
    - All fields and Emails becomes non-editable
    - Customize button is disabled
    - Demand Note button is enabled

49. Click Demand Note. The Orders – Demand Note View appears.

    Note: Based on the broadband details the demand note is generated and the amount to pay is displayed in this view. The amount due is displayed in the Total Amount field. Make Payment button on Broadband Demand Note view tab is activated. If the customer has any dues or if the balance has to be paid, click Make Payment. This is optional. A Receipt number is auto-populated and the same receipt number is populated for the Landline order.

50. Click **Landline order** view tab. The Landline Orders View appears.

    Note: It is required to submit the landline order before the Broadband order can be submitted.

51. Click Landline Order Number. The corresponding Landline Order appears.
52. Click **Submit Order** of landline. All the other tabs are non-editable.

    Note: After the submission of the order is successful, the Order Status changes to *Submission In Progress.* Once the system submits the details to the downstream systems automatically, the status changes to In Progress.

53. Click Child Order View tab. The Orders – Child Order View appears.
54. Click Order #. The Broadband Order Details View appears.
55. Click Submit Order of broadband. Order is submitted for further processing.

    Note: If the order is submitted successfully, a message, *Broadband Order submitted successfully* and change order status to *Submission In progress.* Change Root line item Action Code to *Update***.** Once the order is completed, the view becomes completely non-editable.

56. Verify the landline order status.
57. Click Broadband – Landline View Tab.
58. Click Order #. The Landline Orders – Details View appears.
59. Click Orders – Milestone View tab. Verify in the Milestone section the Service Order status is Complete. Verify the other OMIT tasks to be complete.
60. Verify that the Order status is Complete.
61. Click Services tab. The Services List View appears.
62. Click Query. Provide the Service Id as search criteria.
63. Click Go. The service record that was created appears.
64. Verify the products in the Services – Components View tab to be same as per customer request.
65. Verify the broadband provisioning:

66. Click Services – Components View tab. Verify that the ‘Broadband’ product component is available in the products column.
67. Highlight the row corresponding to the ‘Broadband’ product in Service Detail - Components view.
68. Verify the Broadband Email List has the same number of rows and email addresses as requested by customer.
69. Click Services – More Info View. Verify the User Id is populated as same as requested by the customer.
70. Click Services – Components View tab.
71. Click Service # corresponding to the ‘Broadband’ product. The Component details for broadband are displayed.
72. Verify that the plan and modem are as requested by the customer in CAF.
73. Highlight the modem component and click Service #. The Service Detail View is refreshed. Click Services - Attributes View tab. Verify the modem details.

    Note: In case the customer has requested for Static IP, verify in Service Detail, broadband components view tab.

8.2 Broadband Provision for an existing Landline

A Broadband provision for an existing landline occurs when the customer requests for a Broadband connection,

Prerequisites to proceed: Customer should have a permanent landline connection.

Users: CSR

To provide the broadband provision on existing Landline:

1. Click Customer Accounts screen The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search fields.
3. Click Go. The Customer Accounts – Account Summary View appears.
4. Select the Order Sub Type field values as Broadband Provision.
5. Click Modify. The Broadband Detail View appears.
6. Click Customize. The Product Configurator View appears.
7. Follow Step 36 to 46 in Creating a New Broadband Connection

   Note: Make Payment button on Broadband Demand Note view tab is activated. If the customer has any dues or if the balance has to be paid, click Make Payment button. It is optional. A Receipt number is auto-populated.

8. Click **Submit Order**. The order is submitted.

   Note: If the order is successful, a message**,** *Broadband Order submitted successfully*, appears. Change the Order Status to *Submission In progress* and change Root line item Action Code to *Update.*

8.3 Modify Scenarios

8.3.1 Modifying the Broadband

Prerequisites to proceed: The customer should have an existing Broadband connection.

Users: CSR

To modify the broadband on an existing connection:

1. Click Customer Accounts screen. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search fields.
3. Click Go. The Customer Accounts – Accounts Summary View appears.
4. Select the Order Sub Type field values as Broadband Modify.
5. Click Modify. The Broadband Detail View appears.
6. Click Customize. The Product Configurator View appears.
7. Follow Step 36 to 46 in Creating a New Broadband Connection.

   Note:

   i. Select only the tabs that have to be modified. For example, Plan, Modem Type and so on

   ii. Make Payment button on Broadband Demand Note view tab is activated. If the customer has any dues or if the balance has to be paid, click Make Payment. It is optional. A Receipt number is auto-populated

8. Click Submit Order. The order is submitted.

   Note: If the order is successful, then a message, *Broadband Order submitted successfully.* Change the Order Status to *Submission In progress* and change Root line item Action Code to *Update*.

8.3.2 Broadband Static IP Change

Prerequisites to proceed: The customer should have a Broadband connection.

Users: CSR

To provide the Broadband Static IP Change on the existing broadband connection:

9. Click Customer Accounts screen. The Customer Accounts Home View appears.
10. Enter any or all of the values in the Search field.
11. Click Go. The Customer Accounts – Account Summary View appears.
12. Select the Order Sub Type field values as Broadband Static IP Change. Click Modify. The Broadband Detail View appears.

    Note: The Sub Status field is set to Validation Successful. Submit button is enabled.

13. Click Submit. The order is submitted.
14. On completing the Static IP change, verify the order status to be Complete.
15. Click Milestones View tab, and verify the NIB tasks are completed successfully.
16. Click Services tab and search for the Service Id.
17. Click Service #. The Services – Components View appears.
18. Verify that the Broadband product component is available in the products column.
19. Highlight the row corresponding to the Broadband product in Services - Components view.
20. Click Service # corresponding to the Broadband product. The Component details for broadband are displayed.
21. Highlight the 'Static IP' component. Click Service #. The Services Detail View is refreshed.
22. Click Services – Attributes View. Verify the updated static IP details

8.4 Shift Scenario

8.4.1 Shift of Landline within the Exchange (without number change)

In this scenario, the customer can request for a shift of address within the same exchange and may want to retain the same phone number and Broadband Connection. Before the Shift process starts, it is required that the entry of the new installation address is completed in the Addresses view tab for that particular customer, otherwise the user has to stop the process in between, when the new address is being entered in the Orders Detail view.

Prerequisites to proceed: Customer should have a permanent Landline and broadband connection provisioned.

Users: CSR

To provide the Shift of Broadband connection within the same exchange without the number change: :

1. Click Customer Accounts. The Customer Accounts Home View appears.
2. Enter any or all of the value in any or all of the fields in Search field for which the landline facility should be permanently removed.
3. Click Go. The Customer Accounts – Account Summary View appears.
4. Click Addresses View tab. The Addresses view with various types of addresses appears.
5. Click New. A new address with the Address Type as Installation Address appears.
6. Click Account Summary view tab. The Customer Accounts – Account Summary view appears where the services provided to a particular customer is displayed.
7. Select the Order Sub Type field value as Shift Within exch w/o NumChg.
8. Click Ctrl + S. The record is saved.
9. Click Shift. The Order detail view appears and Accessory Check button is enabled. Two orders are created as given below:
    a. First, the Order Type as Shift and Order Sub Type as Shift Within exch w/o NumChg (Child order or Reconnection order)
    b. Second order with Order Type as Shift and Order Sub Type as Disconnect (Parent order or Shift-Disconnect order). The Orders Detail view of the Child order appears
10. Select the Nature of Shift field value under the More Info view tab. If the value selected is:

Shift CRD - In this case, the shift occurs on the date requested by the customer. At this point, the Accessory Check button is active. The Installation address has to be changed. An alert appears if it is not changed. Customize Landline order if required.

Note: Follow Step 25 to Step 27 in **Creating a New Broadband Connection.**

11. Click Accessory Check. The Sub Status field value changes from Pending to Accessories Check Done.
12. Change the Customer Requested Date to the date requested by the customer.

    Note: You can change this field only after the Accessory Check is complete and before you click the Validate button.

13. Click Validate. A message, Validations are successful, appears. The Follow On button is enabled.
14. Customize broadband order if required and feasible.

    Note: Follow Step 35 and 61 in Creating a New Broadband Connection

Shift When feasible: in this scenario, shift takes place whenever it is feasible for BSNL. The Accessory Check button is active when it is feasible.

Note: Change the installation address, failing which an alert is generated that the installation address needs to be changed. Customize Landline order if required.

Note: Follow Step 25 and 27 in **Creating a New Broadband Connection**

15. Click Accessory Check. The Sub Status field value changes from Pending to Accessories Check Done.
16. Click Validate. A message, Validations are successful, appears. The Follow On button is enabled.
17. Customize broadband order if required and feasible.

Note: Follow Step 35 and 61 in **Creating a New Broadband Connection**

Shift Immediate: The user can complete the disconnect order (parent order) before the child order as the Submit Order button and the Available Numbers button are both active.

Note: Change the installation address, failing which an alert is generated that the installation address needs to be changed.

18. Customize Landline order if required.

Note: Follow Step 25 and 27 in **Creating a New Broadband Connection**

19. Click Accessory Check. The Sub Status field value changes from Pending to Accessories Check Done.
20. Click Validate. A message, Validations are successful, appears. The Follow On button is enabled.
21. Customize broadband order if required and feasible.

Note: Follow Step 35 and 61 in **Creating a New Broadband Connection**

8.4.2 Shift of Landline within the Exchange(with number change)

Prerequisites to proceed: Customer should have a permanent Landline and broadband connection provisioned.

Users: CSR

To do the Shift of Broadband process within the same exchange and without changing number, follow the procedure below:

1. Click **Customer Accounts**. The Customer Accounts Home View appears.
2. Enter any or all of the values in the Search Criteria.
3. Click Go. The Customer Accounts – Account Summary View appears.
4. Click Addresses View tab. The Addresses view with various types of addresses appears.
5. Click New. A new address with the Address Type as Installation Address appears.
6. Click Account Summary view tab. The Customer Accounts - Account Summary view appears, displaying the services given to that particular customer.
7. Select the Order Sub Type field values as Shift Within exch w/o NumChg.
8. Click **Ctrl + S**. The record is saved.
9. Click Shift. Two orders are created as given below:

a) First, the Order Type as Shift and Order Sub Type as Shift Within exch w/o NumChg (Child order or Reconnection order).

b) Second order with Order Type as Shift and Order Sub Type as Disconnect (Parent order or Shift-Disconnect order). The Orders Detail view of the Child order appears.

10. The Order detail view appears and Accessory Check button is enabled.
11. Select the Nature of Shift field value under the More Info view tab. If the value selected is:

Shift CRD - In this case, the shift occurs on the date requested by the customer. At this point, the Accessory Check button is active. The Installation address has to be changed. An alert appears if it is not changed. Customize Landline order if required.

12. Follow Step 25 and 27 in Creating a New Broadband Connection
13. Click Available Numbers. A list containing phone numbers available in the current exchange appears.
14. Select a number from the list. The selected number gets populated in Service Id (Ph #) field.
15. Click 'Reserve Number'. The Sub Status field value becomes "Port Available".
16. Click **Accessory Check**. The Sub Status field value changes from Pending to Accessories Check Done.
17. Change the Customer Requested Date to the date requested by the customer.
18. **Note:** You can change this field only after the Accessory Check is complete and before you click the Validate button.
19. Click **Validate**. A message, *Validations are successful*, appears. The Follow On button is enabled.
20. Customize broadband order if required and feasible.
21. **Note:** Follow Step 35 and 61 in **Creating a New Broadband Connection**

Shift When feasible: in this scenario, shift takes place whenever it is feasible for BSNL. The Accessory Check button is active when it is feasiable.

Note: Change the installation address, failing which an alert is generated that the installation address needs to be changed. Customize Landline order if required.

22. Follow Step 25 and 27 in **Creating a New Broadband Connection.**
23. Click **Available Numbers**. A list containing phone numbers available in the current exchange appears.
24. Select a number from the list. The selected number gets populated in **Service Id (Ph #)** field.
25. Click '**Reserve Number**'. The Sub Status field value becomes "**Port Available**".
26. Click **Accessory Check**. The Sub Status field value changes from Pending to Accessories Check Done.
27. Click **Validate**. A message, *Validations are successful*, appears. The Follow On button is enabled.
28. Customize broadband order if required and feasible.
29. Follow Step 35 and 61 in **Creating a New Broadband Connection**

Shift Immediate: The user can complete the disconnect order (parent order) before the child order as the Submit Order button and the Available Numbers button are both active.

Note: Change the installation address, failing which an alert is generated that the installation address needs to be changed.

30. Customize Landline order if required.
31. Note: Follow Step 25 and 27 in **Creating a New Broadband Connection**
32. Click Available Numbers. A list containing phone numbers available in the current exchange appears.
33. Select a number from the list. The selected number gets populated in Service Id (Ph #) field.
34. Click ‘Reserve Number’. The Sub Status field value becomes “Port Available”.
35. Click **Accessory Check**. The Sub Status field value changes from Pending to Accessories Check Done.
36. Click **Validate**. A message, *Validations are successful*, appears. The Follow On button is enabled.
37. Customize broadband order if required and feasible.
38. Follow Step 35 and 61 in **Creating a New Broadband Connection.**

8.4.3 Shift Across exchanges

Prerequisites to proceed: Customer should have a permanent Landline and broadband connection provisioned.

Users: CSR

To do the Shift of Broadband process across exchange, follow the procedure below:

1. The only differences between the scenarios Shift of Broadband Across Exchange and Shift of Broadband within Exchange with Number change is:
2. In Shift of broadband across Exchange, the Exchange Type of the new Installation Address has to be different from the previous Installation address. The Order Sub Type is Shift Across Exchanges
3. In Shift of broadband within Exchange with Number change, the installation address has the same exchange as its previous address. Also, the Order Sub Type is Shift Within Exch with NumChg.
4. Refer to Step 1 to 20 of **Shift of Landline within the Exchange(with number change)**

8.4.4 Normal Disconnection

1. The customer may want to disconnect both Landline and Broadband connection due to some reasons. This is the case when Normal Disconnection occurs.

Prerequisites to proceed:

- Customer should have a permanent Landline and broadband connection provisioned.
- CSR Retention should provide disconnection reason and comments for the activity.

Users: CSR

To do the disconnection of the complete service, that is, Landline with Broadband:

Click Customer Accounts. The Customer Accounts Home View appears.

1. Enter any or all of the values in the Search field.
2. Click Go. The Customer Accounts – Account Summary View appears.
3. Click Account Summary view tab. The Customer Accounts - Account Summary view appears, displaying the services given to that particular customer.
4. Select the Order Sub Type field values as Disconnect.

5. Click Ctrl + S. The record is saved.

6. Click Disconnect. The Broadband Detail View appears.

   Note: All fields except the Customer Requested Date in this view are enabled for modification.

7. Select the appropriate date. Click Activity view tab.

8. Click **Approve**. The order is approved.

9. Click **Submit**. Once the order is completed, the view becomes completely non-editable. If successful, the Sub Status becomes *Submission In Progress* and *In Progress* if submitted to downstream.

8.4.5 Broadband Disconnection

In this scenario, the customer can disconnect only the Broadband connection due to any reasons.

Prerequisites to proceed:

- Customer should have a permanent Landline and broadband connection provisioned.
- CSR Retention should provide disconnection reason and comments for the activity

Users: CSR

To disconnect the broadband:

1. Click **Customer Accounts**. The Customer Accounts Home View appears.

2. Enter any or all of the values in the Search field.

3. Click **Go**. The Customer Accounts – Account Summary View appears.

4. Click Account Summary view tab. The Customer Accounts - Account Summary view appears, displaying the services given to that particular customer.

5. Select the Order Sub Type field values as Broadband Disconnect.

6. Click Ctrl + S. The record is saved.

7. Click **Disconnect Broadband**. The Broadband Detail View appears.

   Note: All the fields except the Customer Requested Date in this view are enabled for modification.

8. Select the appropriate date.

9. Click activity view and click Approve.

10. Click **Submit Order**. Once the order is completed, the view becomes completely non-editable. If successful, the Sub Status becomes *Submission In Progress* and *In Progress* if submitted to the downstream systems.

A Annexure

The list of roles and responsibilities for CDR are provided in the excel sheet given below:

CDR_ROLES.xls